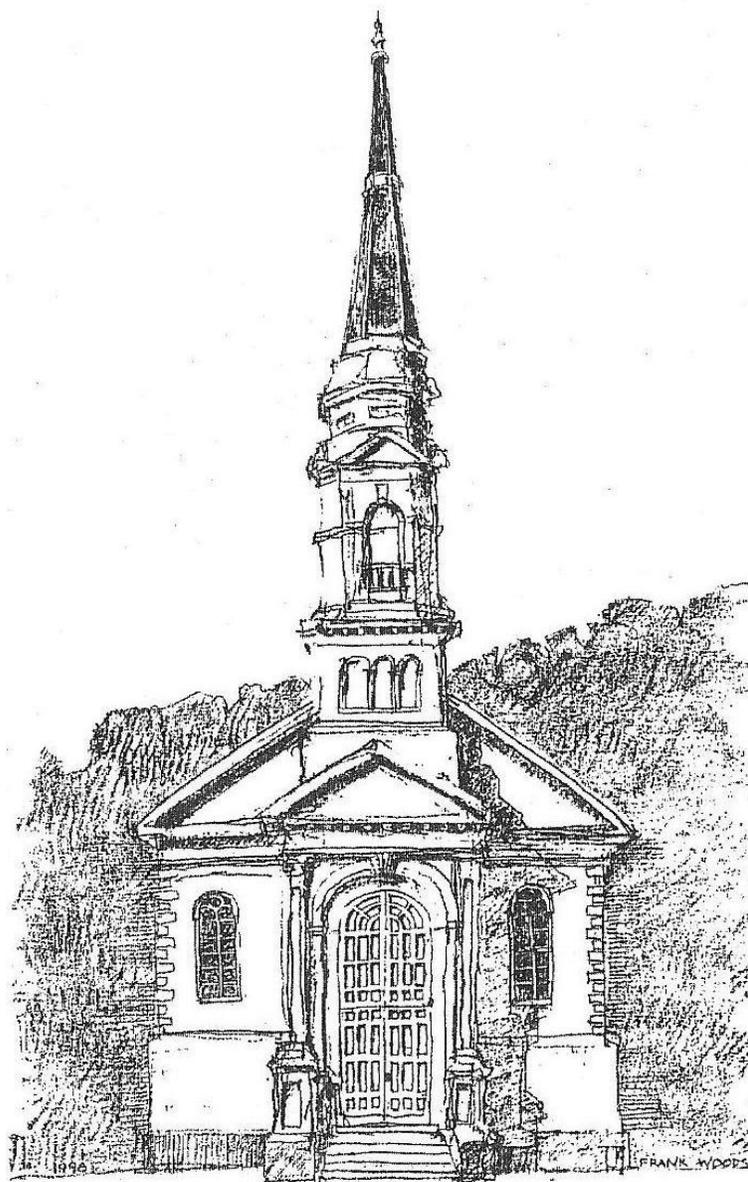


Unitarian Church of Montpelier  
Annual Meeting  
May 21, 2017



UNITARIAN CHURCH OF MONTPELIER

Cover Art by Frank Wood

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# **Annual Meeting Business**

## **WARNING**

### **For the Annual Meeting of the Unitarian Church of Montpelier**

To be held on **Sunday, May 21, 2017 at 11:00 am** in the Sanctuary

All are encouraged to attend to discuss and have Active Members vote on the following:

1. Election of meeting moderator
2. Chalice lighting and overview of Church year
3. Approval of the 2016 Annual Meeting minutes
4. Approval of the General Fund budget for the FY 2018 church year
5. Approval of the Capital Fund budget for the FY 2018 church year
6. Election of the following members nominated to serve on the UCM Board for 2 year terms:
  - Nancy Read
  - Priscilla Fox
  - Julie Tessler
  - Ryan Kane
7. Updates from Board members
8. Conduct any other new business

There will be an informational meeting to discuss the proposed budget in the sanctuary after service on Sunday May 14<sup>th</sup>.

Posted May 7, 2017

## **2017 Annual Meeting Agenda**

1. Election of meeting moderator
2. Chalice lighting and overview of Church year
3. Approval of the 2016 Annual Meeting minutes
4. Approval of the General Fund budget for the FY 2018 church year
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6. Election of the following members nominated to serve on the UCM Board for 2 year terms:
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  - Priscilla Fox
  - Julie Tessler
  - Ryan Kane
7. Updates from Board members
8. Conduct any other new business

## UCM Annual Meeting Minutes 2016

Sunday, May 22, 2016

11:10 AM

Meeting called to order by Board appointed moderator, Amy Willis

Board members counted those active members present by a show of hands. 62 counted and quorum verified (25% of 235 active members is 59)

Opening invocation read by Brenda Bean (reading by Rig Veda )

Meeting Minutes Approval:

- Amy Willis called for a motion to approve the minutes from the 2015 Annual Meeting minutes.
  - Paul Ohlson made a motion to accept the minutes in their entirety. Nancy Read seconded the motion.
  - Malcom Fitzpatrick proposed amending the motion, referring to page 6 of the 2015 annual meeting minutes, to strike the statement that the painting was given to UCM by his family. It was not. The motion was seconded by Tina Ruth. Unanimous approval by voice vote.
- The Moderator called for a motion to approve the minutes from the Special Congregational meeting of February 14, 2016.
  - Nancy Sherman moved to accept the minutes. Tina Ruth seconded the motion. Unanimous approval by voice vote.

2016-2017 Budget Approval Process:

- Dan Groberg explained that we have surpassed the pledge goal for the 2016-2017 budget which was listed in the annual report. The total pledged now stands at \$235,000.
- Amy Willis announced that Muriel Bianchi made a \$6,500 bequest to the church, recognizing her generosity that will help to sustain this community as much as she did through all her years with UCM.
- To help those present to understand the crafting of the 2016-17 budget, the summary written by the Finance Committee (in the annual report) was called to the Congregation's attention.

General Operating Budget:

- The moderator asked if there is a motion to approve the General Fund budget. So moved by Paul Ohlson. The motion was seconded by Dee Montie.
- The moderator asked if there was further discussion.
- Paul Ohlson spoke of the Coming of Age program. One of the items removed from an earlier draft of the budget was \$3,000 for the senior high group. Paul Ohlson moved to add that amount back to the budget. Seconded by Donna Russo-Savage.
- Dan Groberg, from the Finance Committee, stated that there were two failed searches for the position (which would be funded by this money) in the past. The decision to remove it from an earlier draft of this budget was not only about financial concerns.

- Tina Ruth suggested that, if we're going to take suggestions for putting items back into the budget, we hear an entire list so those present can see them all at once so we can see how they interact.
- Alex Thayer suggested that we not use "call the question" in this process. She, also, would like to know what any other proposals are as well as what items have been removed. She expressed her appreciation for those who worked on creating this budget.
- Nancy Read stated that the Board discussed this earlier. The board's position is that, since all of our pledges are not always collected, it might be best to approve what we have and then, as the year progresses, we can go ahead and make adjustments to the expenditures if the money allows. Doing it today would be a long process. Nancy suggested that we hold still with what we have for now and table the amendment.
- Sandal Cate asked if the work of high school coordinator position could be considered to be a part of the RE Director position.
- Paul Ohlson found Nancy's argument compelling and withdrew his motion to amend his original motion.
- Kairn Kelly stated that the RE Committee is working with both the youth and members of the congregation to make sure that we have developed programs that are meaningful and sustainable for high school youth.
- Scott asked about how much the board could approve without the congregation's approval. The answer is \$5,000. Any amount over that would have to come back to the congregation.
- Tina Ruth agrees with Nancy Read's statement.
- The moderator asked – any further discussion on the budget?
- Norma Raymond – asked to please have the budget in larger print next year.
- Brenda Bean – given that we have raised extra money, Brenda wants to know what things were knocked off the list to get from the desired budget of \$243,000 to \$222,000. Brenda asked to see where the budget shows the total expected expenses for the year even though the total expected income is listed. Nancy Read responded – the budget is on p.s 11-14 of the Annual Report. That has everything in it. In total, with the expenses compared to the income, there would be a surplus of \$238.
- Colin Tait – agrees with Nancy's suggestion that we adopt the budget and refer it back to the finance committee if needed.
- Paul Hartmann called the question. Melinda Moz-Knight seconded. The motion to call the question passed with 49 in favor.
- There was some discussion over where the total amount for income and expenditures is listed in the budget. These amounts are found in the explanation on pages nine and ten of the annual report with expenses of \$287,079 and a surplus of \$238.00.
- The original motion to approve the General Fund Budget as proposed passed (voice vote) with one vote against.

#### Capital Fund Budget vote:

- The Moderator asked for a motion to approve the Capital Fund budget for the 2016-2017 budget as written. So moved by Rhoda Chickering with second by Dan Groberg.
- Page 13 and 14 of the annual report has the breakdown of this budget. Paul Ohlson explained this proposal, referring to the narrative found on page 10 of the annual report.

- Jane Osgathorp asked where we see the Jackmann fund listed. Is it in our possession yet? Nancy Read explained that this bequest is within the Long Term Invested Fund (see the top of page 11 of the annual report under “Notes”) and that money earned from that fund goes toward the capital budget.
- Tina Ruth referred to page 13, inquiring about replacing the 40 year old fuel tanks. Tina asked that we consider whether we could join the Capital District Heating System.
- Paul Ohlson responds that the fuel tanks have been replaced. Joining the Capital District Heating System has been examined and analyzed and found to be quite expensive. We’d love to be part of that but it would be incredibly expensive (about \$150,000) to take part.
- Scott Hess referred to page 13, item # 5191, to answer Jane Osgathorp’s question about the transfer from the LTIF to the Capital Fund.
- Dan Jones spoke to the district heat system. That is a long-term (substantial) investment. If oil significantly increases in price, we should be prepared to reconsider it then.
- Alex Thayer asked if the amount for the capital budget is approved, can the property committee have flexibility in how it uses this amount. Secondly, she asks that every budget give us what the Long Term Invested Fund is at the start and end of year.
- Paul Ohlson stated that the budget items listed are the ones we plan to spend the money on. If some money becomes available out of this, the property committee has the authority to make changes of up to \$1,000. The ET has the authority to make a change of up to \$5,000. Above that, it goes to the congregation.
- Jane Osgathorp spoke to the possibility of joining the Capital District Heating System. Jane recommends that we set aside a certain amount each year to be prepared.
- Malcom estimates that the amount proposed is ~4% of the invested fund. Malcom is concerned this may not be enough. Malcom recommends that we replace the front steps with granite. How do we set aside money in the capital budget for serious improvements which are badly needed and good for the long-range plight of the building?
- Paul Ohlson spoke to looking at what the needs of the church are over the next 20 years. There is a 20 year maintenance plan in place. If we stick to that plan, we will be OK. But, if we want to do other things like an additional elevator or a significantly improved kitchen or really fix the front steps, or to join with the Capital District Heating System, these are not included in this budget. To accomplish these goals, which are not in the maintenance plan, we may need to look at a capital improvement campaign.
- Dee Montie addressed Alex’s question. She spoke with the trust company of Vermont. We have been able to increase the value of the LTIF over time. At this point we have doubled the LTIF. This allows us to take more money out for the Capital Budget than in the past. Instead of ~\$30,000/year, we are now looking at over \$60,000/year.
- Scott Hess noted that there is no limit on the amount that can be taken out of the LTIF.
- Lou Cherry called the question. Paul Hartmann seconded this motion to call the question. More than 2/3 voted (by hand) in favor.
- The moderator called for vote to adopt, in its entirety, the Capital budget - Unanimous approval by voice vote.

#### Use of Long Term Invested Fund for Legacy Donation:

- Amy Willis invited Melinda Moz-Knight (Chair of the Legacy Donation task Force) to speak to the process of developing this proposal.

- The task force started work in January, meeting weekly. Over 40 agencies were invited to make proposals. Nineteen agencies responded. The committee narrowed it down to the five listed in the annual report (pages 15-17). The ET and the Board fully supported the report of the task force.
- Liz Benjamin – Is this a one time gift to these agencies? – Melinda answered yes.
- Scott Hess asked about Washington County Youth Services – what about year two? Melinda answered that the first year is more intensive. This agency expressed that the first year amount will get them through both years of the lease.
- Paul Hartmann made a motion to approve the proposal for the donation. Colin Tait seconded.
- Priscilla Fox spoke strongly in favor of the proposal. One of our primary functions is to serve human need. She recognizes that many people have concerns about this proposal. There is always more that we can do for the church. This is an unusual and very generous gift. It is our duty to share this donation with the community. Priscilla urges all to vote for this motion.
- Dee Montie understands that this vote is to the expenditure of the funds from the Jackmann Bequest. Now we can discuss spending the money? Amy Willis answered yes. Dee Montie suggested that those seriously opposed to this expenditure of the LTIF for causes outside of this building speak now. Dee Montie noted that opposition to this expenditure does not, necessarily, indicate opposition to the proposed recipients.
- Dan Groberg asked how the vision and strategic plan will be funded. The vision speaks to supporting efforts outside of the church (community activities). Brenda Bean responds, as a member of the 2020 Vision Task Force, that the plan addresses several processes to examine looking at our space and human need, among others. Brenda recognizes this plan, to donate money to other community organizations, as very relevant to our vision.
- Judith Hinds thanked the task force for their work. Judith noted that we would be engaged in the vision and strategic planning whether the bequest was received or not. The motion is to share this bounty with the community. Judith strongly supports this motion to practice our generosity.
- Norma Raymond, a member for 75 years, expressed that it has been difficult for her, in many years, to make her pledge. Norma asks if the organizations asked for this money? Amy Willis answers – no. Why is one getting \$21,000? What will they do with it? Melinda answers that the annual report includes a description of what will be done with the money. The task force looked at how the money would be used. The task force felt that this use of the money was a good choice. No organization came to us to ask for money. The task force asked community organizations if they had a proposal. Norman Raymond asked if other groups will ask again? Will we keep funding them? Amy Willis answered that this is not the plan and that this proposal was for a one-time gift.
- John Poeton stated that any time we get a bequest, the amount will always be a surprise. Bob Jackman was the music director for this church. The Jackmans gave 1.5 million dollars to organizations in this community. We are a very generous church. We give to community organizations from our community pouch. At one point the proposal for next year was to give 100% of the community pouch to the community. This plan was abandoned due to a lack of pledges. The Jackmans told us that their interest in this church was in music and religious education. We just passed a budget of nearly \$300,000. If you only have, in your own budget, the equivalent of only 2.5 years of your yearly

expenses you would not feel financially sound. \$700,000 sounds like a lot of money. For a church whose annual budget is rising to over \$300,000, \$700,000 is not a lot of money.

- Barbara Thompson noted that this is an interesting debate. Perhaps the question of whether or not to give money to fund community organizations should have been brought to the congregation prior to seeking proposals. We now have a committee that has looked at this closely. Now the community has expectations. If we thought we weren't going to give this money, perhaps we shouldn't have asked. She believes we should support this motion with trust in the good faith of members of the task force.
- Scott Hess spoke against this proposal. When we make a pledge, we pledge to the church. We give to other organizations, too. We should keep this money for the church's efforts.
- Francis (Fran) Dodd spoke in support of the Youth Service Bureau. Fran respects the work of the task force. However, the Jackmans gave this money to the church. Fran does not feel that voting against this proposal undermines our generosity. Fran does not support this expenditure.
- Malcom Fitzpatrick agreed with Scott Hess and others. We should build the Long Term Investment Fund (LTIF). If we want to give away the interest on it, that's fine. We should not use the basis funding that is there. There are many needs for capital improvement for this church that, when done, allow us to continue to provide community support. For instance, capital is needed to improve the kitchen to make us more able to support the community kitchen (which supports over 100 people every Monday). We need the full amount in the LTIF. This motion should not be passed.
- Dan Jones spoke against the motion. The process and the causes are admirable. But, is this the best way for us to use these funds? Is this the best way for us to move toward our vision? We have many other demands that need to be met that might strengthen our ability to respond.
- Nancy Schulz spoke in favor of the motion. We are amazingly honored and surprised to receive this generous legacy. Giving this money is an act of generosity of the Jackmans. We, too, can share with others in need. It will, clearly, make a difference in many lives. It is remarkable what this church does. This is a one-time opportunity.
- Alex Thayer spoke of the history of the use of similar funds in the past. Alex began to feel, years ago, that the amount of money in the LTIF was somewhat of an obscenity for a religious organization. We beget generosity by being generous. At what point do we keep saying we need more? We really need to think if we already have enough money in the fund.
- Nancy Read stated that Paul Wallace-Brodeur told her that there is about \$740,000 in the LTIF. With the expenditure proposed, we are at about \$690,000 or 121% of the benchmark that the UUA has for a reserve fund. We would need about \$577,000 to meet that benchmark of twice our annual expenses. Nancy is strongly in favor of this proposal.
- Donna Russo-Savage called the question. Will White seconded calling the question. Over 2/3 vote yes (hand vote).
- The motion, made by Paul Hartmann and seconded by Colin Tait, is to approve the use of \$52,200 of the Long Term Invested Fund for a legacy donation to the central Vermont community in honor of the Jackman bequest. A 2/3 majority is needed to approve the motion.
- 56 voted yes. 21 voted no. The motion carries.

Bylaw change:

5.6 Vacancies The Board fills any elected officer vacancy until the next annual meeting. If, at that time, the originally elected officer had one year remaining of a two-year term, Church members will elect a new officer for one year in order to preserve staggered terms.

Article 6.1.7 – Ensure that there is ~~financial review of all congregational policies, practice and accounts by an outside auditor at least every three years~~ **an examination of the financial books and records of the Church at least every three years by a person or persons designated by the Board.**

- Paul Hartmann moved to approve the proposed changes. Seconded by Lou Cherry.
- Paul Ohlson asked for explanation of the proposed change.
- Nancy Read explained the difference between a financial review by an outside auditor and an examination of the financial books and records. The Board feels it's important for the board to have more latitude in deciding how best to conduct such an examination. There is a checklist that has been developed for the examination that would be used.
- Peggy Lipscomb believed the by-law changes should be voted on one at a time.
- Alex Thayer spoke to her concerns about embezzlement and the unfortunate concern that we must address. This amendment to the by-laws should be rejected until there is a mechanism in the by-laws for the congregation to require that there be an audit. Are we bonded? Amy answered that, yes, we are. Amy also stated that looking for financial fraud is not what we have looked for in the past.
- Nancy Sherman moved the question. Hedi Ballantyne seconded. The question was called with a clear 2/3 majority (hand) vote.
- The original motion passed with a clear majority (hand) vote.

Election of Board Officers:

- Bios of the nominees are in the annual report. The nominees are Paul Hartmann, Jennifer Payne, and Jo Romano. Each nominee would serve a two-year term.
- Scott Hess moved to approve the slate of officers as nominated by the Leadership Development Committee on behalf of the Congregation. Melinda Moz-Knight seconded the motion. Unanimous approval by voice vote.

Other Business:

- Jo Romano asked that the Executive Team (ET) come forward. Judith Hinds, Joan Javier-Duval, Tina Ruth, and Joanna Meyer are present. Paul Wallace Brodeur is not present. Jo, on behalf of herself, the board, and the members of the congregation, expressed her thanks for their work on the ET. Jo also thanked all of those who put so much work into this church.
- Peter Thoms expressed thanks to Amy Willis and Stuart Russo-Savage who served on the board as well as all of those who worked on the Community Lunch. Last, what a first year for Joan!
- Joan Javier-Duval expressed her appreciation for the thoughtful discussion which occurred today about the legacy gift and giving of a portion of the bequest out into the

community. Joan looks forward to finding new ways that we can continue to deepen relationships with other community organizations.

- Joan, on behalf of the ET, recognizes and honors one committee in particular, the 150<sup>th</sup> Anniversary Committee, with a small token of our appreciation (Unitarian coffee mugs) for the work of each of the committee members.

Nancy Read moved to adjourn the meeting. Priscilla Fox seconded the motion. By unanimous voice vote, the congregation voted to adjourn.

Meeting adjourned by Board President Amy Willis. 12:36 PM

## **Proposed Budget Summary 2017-18**

### **General Fund Budget Summary**

#### Income:

The recommended budget increases our pledge income from the \$222,000 that is in last year's budget to **\$259,000**. We have the good fortune of exceeding our pledge income goal for the first time in anyone's recent memory. The current recorded pledges are approximately \$264,000, but given that actual income from pledges is typically below pledges made, the amount used in the budget is about 98% of pledges made.

The budget retains the Sunday pouch collection 50-50 split between the Church and community groups, but the amount contributed has been increased from \$8,000 to \$13,000 based on the experience this year. Expected rental is projected to be down based on current use. Other income lines have received adjustments based on current year performance or expectation for next year. No change has been made in the rescheduling of the auction for the fall of 2017.

Total General Fund income is proposed at **\$322,633**.

#### Expenses:

A significant portion of our operating budget is devoted to personnel. In terms of staff, we have followed our policies related to Fair Compensation. Salary ranges have not been changed as the UUA has elected to not update them for 2017. They are undertaking in 2017a full review of all their compensation guidelines, including position descriptions, salary ranges, and Geo Indexes, and will publish fresh guidelines for the 2018-19 church year. UCM staff salary increases are thus made within our current salary ranges.

We have increased the RE position from 70% to 75% time, and the Sexton from 25% to 35% time and increased his rate to the top of the Fair Compensation guidelines for his position in recognition of his additional responsibilities beyond custodial work.

We have additionally increased the compensation lines for the DRE, Music Director, Accompanist, and nursery staff to cover any added staff costs experienced in experimenting with holding two services on up to 8 Sundays during the 2017-18 church year. The aggregate amount of the added compensation for all positions affected is \$1,609 plus federal taxes.

Also, \$400 has been added to compensate staff for personal expenses that incurred in performing church duties.

Two additional staff will become eligible for the retirement program in 2017-18, and have also expressed interest in the retirement matching program, where a 2% voluntary contribution to retirement is matched by an equivalent amount by the Church.

Funding for the non-staff components of the RE and music program are proposed as recommended by the respective committee and/or staff.

Our Administrative budget includes \$2,000 for an in-house video feed of our service to the Fireplace Room or Vestry. And the program budget includes compensation for an intern who will focus on working with our web-site – keeping it up-to date and adding content as indicated.

Routine building maintenance (\$3,000) has been moved from the general fund budget to the capital budget, as this is covered by our annual withdrawal from our invested funds.

As has been the case in the past several years, we are able to honor our commitment to the District and the UUA by fully funding our dues obligations. Our larger membership (from 222 to 244) has increased this contribution by \$1,738. This budget also continues to make a commitment to climate issues through its involvement in a Vermont Interfaith Power and Light as well as VIA. And it includes an increase of \$300, for the budget line for our very successful Community Lunch Program. We have also reinstated a contribution we have made in the past to the UUSC.

In sum, the General Fund expenses as proposed totals **\$322,459** leaving a small surplus of \$150.50.

## Capital Budget Summary

### Income:

The Capital budget, including building maintenance, is funded by a withdrawal of 4% of the value of our long term invested funds as of December 31, 2016 (\$749,219). This withdrawal totals \$29,969. The Capital budget structure is a departure from those of the recent past.

### Expenses:

The items are organized as follows:

- 1. Capital Improvements:** \$4,700 is proposed to level and add a vapor barrier to basement floor.
- 2. Scheduled Maintenance:** \$4,800 is proposed for repair and painting of the addition office, kitchen, and halls.
- 3. General and Unanticipated Maintenance:** \$8,000 is proposed for miscellaneous repairs to the buildings and grounds. We have found that in addition to routine maintenance (\$3,000), in the past several years there have regularly been projects that require attention but are not specifically anticipated in the budget, such as parking lot repairs, signage, building improvements for the community lunch program, shelving, and electrical work. Unanticipated projects such as these will be covered from this line item.
- 4. Capital Reserve Fund:** \$7,000 is proposed to be reserved for exterior painting in 2018-19, and \$4,500 for replacing front steps in 2019-20. Although these amounts won't cover the total expense for these projects, they will contribute to financing them as they both are expected to cost more than can be covered by the annual withdrawal amount. Creating a reserve fund will help smooth out our capital expenditures and cover some larger projects that we know will be needed in the future.

A balance of \$969 will be either added to the Capital Fund or remain in the LTIF if these expenditures remain within the amount budgeted.

## Budget

Unitarian Church of Montpelier	FY 16-17	FY 17-18	Notes
<b>General Fund</b>			LTIF Value 12/31/16: \$749,219 Keve Value 12/31/16: \$22,708
4000 · General Fund Income 4100 · Contributions Income 4110 · Pledges - Current Year 4111 · Pledges- Prior Year 4120 · Unpledged Checks 4121 · Pouch cash (unpledged)  4122 · Donations to Community Pouch 4130 · Coffee/Tea Table 4170 - Miscellaneous Contribution	222,000.00 1,000.00 2,500.00 5,500.00  8,000.00 500.00	259,000.00 2,000.00 4,000.00 6,500.00  13,000.00 500.00	\$37,000 increase  Pouch donations to Church  Pouch donations to community groups
Total 4100 · Contributions Income	239,500.00	285,000.00	
4200 · Fund Raising 4210 · Holiday Fair  4225 · Auction 4235 · Yard/Rummage Sale	11,000.00  5,000.00 1,700.00	8,500.00  4,000.00 1,600.00	Based on prior yr. results (pecans by Alliance) Fall Online/coffee hours auction

4250 · Sermon Sales			
4255 · Directory sales	100.00	100.00	
4260 · Clarke Lectures	2,000.00	2,500.00	Based on recent income
RE Fund			
4270 - Misc Fund Raising	800.00	800.00	
<b>Total 4200 · Fund Raising</b>	<b>20,600.00</b>	<b>17,500.00</b>	
4300 · Income from outside funds			
4311 · Trf from Capital Fund (LTIF)	3,000.00		All building maintenance in capital fund budget
4313 - Trf from Keve (LTIF)	842.04	883.12	Keve Fund used for GF
4320 · Wyman Trust	4,800.00	4,300.00	
4360 Interest from outside funds	-		
<b>Total 4300 · Income from outside funds</b>	<b>8,642.04</b>	<b>5,183.12</b>	
4400 · Use of Building/Resources	17,400.00	14,000.00	Based on current yr. projected income
4500 · Interest on General Funds	175.00	50.00	VCLF income
4600 - Other GF Income			
4610 – Grants	1,000.00	900.00	Grant from Vt/Que UU Convention
<b>Total 4000 · General Fund Income</b>	<b>287,317.04</b>	<b>322,633.12</b>	

6000 · General Fund Expense			
6100 · Ministry			
6110 · Minister Compensation			
6112 · Salary	35,023.00	37,046.00	
6113 · In lieu of FICA	4,974.26	5,129.02	
6114 · Retirement	6,502.30	6,704.60	
6114a - Voluntary Contribution (2%)	1,300.46	1,340.92	
6115 · Housing Allowance	30,000.00	30,000.00	
6116a · Life/Disab Insurance	1,149.61	1,078.10	
6116c - Dental			
6116d · Health Benefit			
6116e - Insurance Reimbursement			
6118 · Prof'l Development	5,500.00	6,000.00	
Total 6110 · Minister Compensation	84,449.63	87,298.64	
Sabbatical Reserve	1,000.00		Any budget surplus goes to Reserve
Computer			
6120 - Ministerial – Search			
<b>Total 6100 · Ministry</b>	<b>85,449.63</b>	<b>87,298.64</b>	
6200 · Religious Education			
6210 · RE Director Compensation			
6212 · Salary	26,301.92	31,729.60	Inc. from 70% to 75% time;

6214 · Retirement	-	-	12 vs.11 month salary 11 mo retirement
6214a - Retirement match - 2%		-	
6216a - Long Term Disability			
6216b - Term Life			
6216d - Cafeteria plan benefit	1,500.00	1,500.00	
6217 · Health Benefits			
6218 · Prof'l Development	1,450.00	1,500.00	
<b>Total 6210 · RE Director Compensation</b>	<b>29,251.92</b>	<b>34,729.60</b>	
6220 · Teachers and Childcare			
6221 · Childcare	1,100.00	700.00	
6222 · Nursery	2,000.00	2,200.00	
6223 · Teacher Training	1,000.00	1,000.00	
<b>Total 6220 · Teachers and Childcare</b>	<b>4,100.00</b>	<b>3,900.00</b>	
6230 · Youth Programs			
6231 - Interfaith Group	150.00		
6232 - HS Youth Group	600.00	600.00	
Adult RE	400.00	500.00	
Bridging	100.00	100.00	
6265- Coming of Age & OWL	700.00	700.00	
6250 · Supplies/necessities	1,000.00	1,000.00	
6260 - Curriculum	300.00	300.00	
6275 - RE Search		1,000.00	
<b>Total 6200 · Religious</b>	<b>36,601.92</b>	<b>42,829.60</b>	

Education			
6300 · Music			
6321 - Choir Director	16,229.00	17,039.00	40% time
6321b - Prof'l Development	1,500.00	1,500.00	
6322 - Accompanist	8,038.00	8,452.60	
6330 · Organ/Piano Tuning and Maintenance	1,600.00	1,600.00	
6340 · Sheet Music	800.00	800.00	
6350 · Special Music	900.00	900.00	
6360 · Professional Memberships	212.00	212.00	
Total 6300 · Music	29,279.00	30,503.60	
6400 · Administration			
6410 · Office Adm'r Compensation			Possible salary adj. Jan 2018 based on SGA
6412 · Salary	21,840.00	23,340.00	
6412a - Salary adjustment		500.00	
6414 · Retirement			
6414a - Retirement - employer	2,184.00	2,334.00	
6414b - Retirement match - 2%	437.00	466.80	
6416a - Long Term Disability			
6416b - Term Life			
Cafeteria plan benefit	1,500.00	1,500.00	
6417 · Health Benefit			

6418 · Prof'l Development	1,100.00	1,100.00	
Total 6410 · Office Adm'r Compensation	27,061.00	29,240.80	
6420 – Office Assistant			
6421 - Salary	15,000.00	16,525.00	50% time
6421a - Retirement	750.00	1,239.00	9 mo. Retirement
6421b - Cafeteria Plan	1,500.00	1,500.00	
6421c - Ret. Matching - 2%	150.00	-	
6421d - Prof'l Development	750.00	500.00	
6422 - Office Expenses	100.00		
6425- Event Hosts	150.00	150.00	
6431 – Copier Lease	1,075.00	1,100.00	
6432 · Copier Maintenance	600.00	600.00	
6434 · Copier Paper	440.00	490.00	
6435 - Printing	250.00	300.00	
6436 · Supplies	250.00	250.00	
6440 · Postage	600.00	600.00	
6450 · Telecommunications	1,975.00	2,100.00	
6455 - Website	1,800.00	600.00	
6456 - Live Sunday service feed to Fire Place Rm.		2,000.00	Add In-house video for Sunday service
6460 · Equipment	2,500.00	2,500.00	
6481 - Bank fees	250.00	275.00	
6482 - Banking supplies	275.00	325.00	

6483 - Staff Travel		400.00	New - to cover work related expenses
Total 6400 · Administration	55,476.00	60,694.800	
6500 - Building			
6510 · Sexton Wages	7,815.00	11,376.68	Inc. from 25% to 35% time
6524 · Snow/Lawns	425.00	500.00	
6526 · Rubbish Removal	830.00	1,100.00	
6530 · Fuel Oil	4,200.00	4,200.00	
6540 · Electricity	3,000.00	3,300.00	
6550 · Water/Sewer	1,350.00	1,350.00	
6560 · Custodial Supplies	1,200.00	1,200.00	
6565 - Fire alarm test & elev. Insp.	665.00	665.00	
6566 - Furnace cl / boiler insp	400.00	450.00	
6570 · Repairs and Maintenance	3,000.00		Now in Capital Fund
6571 · Property Insurance	4,400.00	6,000.00	
6572 - Building safety equipment		1,500.00	Defibrillator
6591 - Elevator inspection		150.00	Required annually
Total 6500 · Building	27,285.00	31,791.68	
6600 · Program Expenses			
6610 · Membership/Extension	450.00	500.00	
6611 - Welcoming congregation	100.00	300.00	
6622 - Community Pouch	8,000.00	13,000.00	Disbursements to pouch recipients

6625 - Communications Committee	1,000.00	800.00	
6626 - Communications Intern		1,200.00	New - to assist with web site development
6630 · Worship and Arts	3,500.00	3,500.00	
6645 - Board	1,000.00	3,000.00	Governance training & funds for building TF
6641 · Leadership Development	1,100.00	1,500.00	
6680 - Historian	1,580.00	1,580.00	
6650 · Finance			
6655 - Stewardship	1,000.00	2,000.00	
6660 · Social Responsibility	100.00	200.00	
6661 - Living Lighter	100.00	100.00	
6670 - Committee on Ministry	100.00	100.00	
6671 - Small group ministry pgm.	250.00	250.00	
6672 - Lay pastoral care	185.00	200.00	
6673 - UCM Soup Kitchen	700.00	1,000.00	
6674 - Accessibility Committee		100.00	
6675 - Special EventsTeam		100.00	
<b>Total 6600 · Program Expenses</b>	<b>19,165.00</b>	<b>29,430.00</b>	
6700 · Outreach/Denominational			
6710 · Contrib. to Care Fund	300.00	300.00	Formerly Minister's discretionary fund
6720 · UUA/District Annual Dues	13,320.00	19,276.00	244 members @\$79/member
6730 · District	4,218.00		Combined with UUA dues

Dues			
6735 - Denominational meetings	-		moved to leadership and denom. devpmt.
6740 - UU Service Committee	-	100.00	New
6750 - Vt Interfaith Action Council	1,000.00	1,000.00	
6751 - Soul Matters Sharing Circle	200.00	250.00	
6755 - Vermont Interfaith Power and Light	100.00	100.00	
Total 6700 - Outreach/Denominational	19,138.00	21,026.00	
6800 - Other Expense			
6810 - Coffee/Tea Table	500.00	500.00	
6820 - Clarke Lectures	1,300.00	1,600.00	
6831 - Holiday Fair	4,000.00	2,000.00	
6832 - Auction	100.00	100.00	
6890 - Miscellaneous			
Total 6800 - Other Expense	5,900.00	4,200.00	
6900 - Payroll			
6910 - Employer FICA	5,903.88	7,513.08	
6920 - Employer Medicare	1,380.75	1,757.09	
6940 - Payroll Expenses			
6950 - Workers comp insurance	1,500.00	1,700.00	
Total 6900 - Payroll	8,784.63	10,970.17	
6998 - Uncategorized			

Expense			
Total 6000 · General Fund Expense	287,079.18	318,744.49	
General Fund Net Operations	237.86	3,888.63	
<b>Capital Fund</b>			
Carry Forward			
Carry Forward Use of balance	-		
5100 Capital Fund Income			
5101 - Contributions – restricted	-		
5193 – Loans from Members	-		
5190 · Transfer from GF	-		
5191 · Transfer from LTIF	29,615.12	29,968.76	4% of LTIF
Total 5100 · Capital Fund Income	29,615.12	29,968.76	
7100 Capital Fund Expense			
Loan Repayments			
Capital projects			
Touch up sanctuary walls	850.00		
Fix exposed motors in cellar	700.00		
Refinish vestry floor	1,591.00		

Staging and removal of organ skylight	2,800.00		
Insulate between buildings and above organ	7,500.00		
Repair/paint stairwells and hallways	1,800.00		
Paint sanctuary floors under pews	2,200.00		
Transfer to GF for miscellaneous repairs	3,000.00		
Update electrical panel by organ	2,800.00		
Level and add vapor barrier to basement	4,700.00		
Handrails for choir/music area	900.00		
Capital Improvements		4,700.00	Level and add vapor barrier to basement floor
Scheduled Maintenance		4,800.00	Repair and paint addition office, kitchen, and halls
General and Unanticipated Maintenance		8,000.00	Miscellaneous repairs to buildings and grounds
Capital Reserve Fund		11,500.00	\$7,000 for exterior painting in 2018-19; \$4,500 for replacing front steps in 2019-20
Total 7100 · Capital Fund Expense	28,841.00	29,000.00	
Capital Fund Net Operations	774.12	968.76	

## **Nominees for the Unitarian Church of Montpelier Board**

### **Nancy Read**



Nancy Read moved to Vermont from northern Virginia in 2006 and joined the Unitarian Church of Montpelier shortly thereafter. She is a retired CPA and loves living in Vermont. She is thrilled to have made so many good friends in the Montpelier area, including many from UCM. She believes that the spirit of community and inclusiveness that exists at UCM is its fundamental strength.

Nancy believes strongly in the importance of service to the church and the larger community. She has worked as a Hospice volunteer. She participated in the Women's Alliance, including serving as Treasurer, as well as on the Finance Committee.

She has been serving the Board as Financial Officer for the past two years, and looks forward to continuing in this capacity. She feels it is a privilege to help lead UCM forward during these exciting and challenging times, as we implement our 2020 Vision and Strategic Plan.

## **Priscilla Fox**



Priscilla Fox has been a member of UCM for over 20 years. During that time she has served on several committees, including Worship and Arts, Social Responsibility, Living Lighter, and Personnel. Also, she was pleased to be a member of the Ministerial Search Committee in 2009. Currently she is a member of a group that has been meeting to discuss issues around UCM possibly providing, or assisting in providing, sanctuary to immigrants at risk of deportation.

Her first term on the UCM Board is ending, and she would like to serve for another 2-year term. She enjoys working with others on policy issues, and due to her many years in government, she has skills in this area. She says, “It has been rewarding to work with Rev. Joan as she has settled into her ministry here.”

Priscilla is glad that our church is a wonderful resource for our community in many ways, both in providing myriad church-related activities and as a welcoming place for many community meetings.

## **Julie Tessler**



Julie Tessler has been a member of UCM for several years and is interested in stepping up her involvement by joining the Board because of her belief in our mission, particularly supporting and strengthening our role in social and environmental justice issues. She views participation on the Board as a way to invest in hope, faith and love – invaluable assets in the current political environment. She believes that the church, in actively working to achieve our mission, can have an important impact that goes beyond our membership and community. By nurturing and educating youth and adults who participate in church and community events, we can plant the seeds for people to achieve greater awareness and boundless good. The opportunity to support our insightful and inspirational minister is also a strong motivation in her desire to join the Board.

Julie has a social work degree in community organization and social planning and has worked for over 20 years as the director of the Vermont Council of Developmental and Mental Health Services, where her responsibilities include political advocacy. Her experience on boards and advisory groups includes two conservation commissions, Central Vermont Area Agency on Aging, Cross Vermont Trail Association, One Vermont Steering Committee, Medicaid Advisory Board and Maple Corner Community Center. Her volunteer and professional work includes refugee resettlement, aging and mental health services, women's issues, youth environmental education and wilderness camping adventures.

## Ryan Kane



Ryan Kane and his wife Kristina have been members of the Unitarian Church of Montpelier for a little over a year now. Both are grateful for the services, for Reverend Joan's thought-provoking, inspirational, and spiritually enhancing sermons, and for the great welcome they have received from the UCM community.

Ryan grew up in Bar Harbor, Maine and spent much of his childhood outside exploring Mount Desert Island and Acadia National Park. He enjoys hiking, biking, swimming, camping, cross-country skiing, snowboarding, and just being outdoors. At Wheaton College, he studied philosophy and met Kristina through the Wheaton Ultimate Frisbee Team. A few years later, he attended Vermont Law School where he focused on environmental law. After graduating in 2013, he spent two years as a law clerk to the Vermont Environmental Court. He now works at a small firm downtown practicing municipal, environmental, and general civil law.

He is interested in serving on the Board in order to provide the perspective of a relatively new member in shaping the goals and policies of the Church into the future. He looks forward to helping implement the 2020 Strategic Plan and helping the community continue to grow. He also serves on the board of the Vermont Chapter of the Sierra Club. UCM's commitment to protecting our environment is important to him. He finds time spent in nature is a spiritually nourishing experience.

## **Growth Study**

The Board has been conducting a growth study of our congregation in accordance with UCM's 2020 Strategic Plan. We have compiled historical data for church membership and actual attendance over the past 10 years. We have spoken with representatives from the UUA and other congregations looking at growth issues, and we have conducted a survey. We are in the final stages of preparing our report which will be completed by the end of this church year. It is clear to everyone that we are a growing congregation. Our forecast on church growth will be used next year in Year 2 of the Strategic Plan as we discuss how we as a congregation will adapt and grow with our new reality of more of us, and as a task force examines the long-range physical space needs of our congregation. Stay tuned.....

Respectfully Submitted,

Priscilla Fox, Board Member at Large

Paul Hartmann, Board Member at Large

## **Annual Reports**

### **Professional Staff and Lay Leadership Reports**

#### **Minister's Annual Report**

Our second year of ministry together was a full one navigating dynamic shifts and changes both within our congregation and in the broader world. This was our first year of implementing our "2020 Vision and Strategic Plan," which guided the ministry of the staff and our many committees. It was also a year of growing in spiritual depth and meaning-making as we individually and collectively navigated life's transitions, asked important questions, and re-committed ourselves to living our deeply held values.

#### Areas of Ministry

##### Worship

Our Sunday service is, in many ways, at the heart of our congregational life, and is the primary way newcomers are welcomed into our community. That being said, planning and leading worship that nourishes the soul, builds community, and inspires us to action is one of my principal responsibilities as your minister.

First, a few statistics: This church year, UCM had 40 regular Sunday services and two Christmas Eve services. Of the 40 Sunday services, 5 of these were multigenerational services. We had 4 services led by the Worship & Arts Committee or other lay leaders, and 4 services led by guest preachers (2 from the UCM community). Our average Sunday attendance through April was 202 adults and children.

As our church year began, our attendance kept pace with last year's, and after the November election, average attendance increased. As we headed into the winter, we started to experience more crowding in the sanctuary and needed to come up with some short-term solutions to more comfortably accommodate those attending our services. The addition of folding chairs and making better use of pew space has helped, and we will continue to look for ways ease crowding in the sanctuary. Next year, we will also look into experimenting with having two Sunday services on a select number of Sundays as a way of more fully welcoming all who wish to participate in this important part of our spiritual life.

#### Pastoral Care

I am grateful to our Lay Pastoral Care Ministry team, led by Mary Jane Ohlson, who provide a steady and consistent presence on Sunday mornings. We have met monthly since August to coordinate care to the congregation and to engage in education and spiritual practice that enriches our ministry. This year, we have also included the Caring Network coordinator in these meetings.

I continue to meet one-on-one with congregants to discuss their concerns, losses, and life challenges and to visit with members/friends in hospitals and nursing homes. This past year, we collectively faced many different challenges in our personal and communal lives. Our UCM community, like any other human community, has faced transition, loss of loved ones, relationship struggles, health issues, and much more. I encourage all of you to continue to reach out to me and the lay pastoral care team to let us know when you might need support.

In terms of pastoral milestones within our community, we dedicated one child after last year's annual meeting and four children in the fall. While a number of congregants experienced the death of family members this church year and some have faced serious illness, we did not have any deaths of UCM members or friends this past church year.

#### Religious Education/Spiritual Development

I am grateful for the wonderful leadership and skill of Acting Director of Religious Education, Liza Earle-Centers, in this area, especially for the religious education of our children and youth and the support she gave to the Adult RE Committee. *You can read the Religious Education report for more detailed information about this ministry area.*

Building on our monthly worship themes, we introduced a new adult small group program, the Soul Matters Circle, which met once a month with a particular focus on the monthly theme. I co-facilitated this program along with Kathleen Bryant from October-May. I also led two "New UU" class sessions, one in the fall and another in the spring. As part of the Adult RE "4th Mondays ARE" program, I led a discussion of William Barber's book, The Third Reconstruction. Finally, I led the monthly Small Group Ministry facilitators' meetings and also wrote session plans throughout the year.

Besides regular religious education programming, a major focus this year was on a transition and re-envisioning process. With the retirement of DRE, Sally Armstrong, at the end of the 2015-2016 church year, we embarked upon a time of transition to allow ourselves the time and space to take stock of our religious education program and how we envision meeting the spiritual needs of our UCM community across the lifespan. This work will continue into next year as we discern the best staffing structure to support the religious education/faith development programming we desire.

## Social Justice/Prophetic Outreach

Social justice and prophetic outreach have taken on a more prominent place in our shared ministry, and in my personal ministry, since the fall as members of our community have felt a greater need to be taking public action to “serve human need” and “protect the earth.”

Given the energy in this area, I continued to provide support and guidance to our UCM Vermont Interfaith Action committee and Social Responsibility Committee attending most of the monthly meetings of each group. I continued to participate in the Clergy Caucus of Vermont Interfaith Action which mobilized in support of various public actions this year. And, I have also given particular attention to resources of the UUA and affiliated organizations to help guide our prophetic ministry.

These are some of the notable actions of public witness that I participated in this year: Transgender Day of Remembrance Action in November; Vermont Interfaith Action Defy Hate Press Conference in November; Solidarity Prayer Service at the Islamic Society in December; the Women’s March in January; Vigil in Solidarity with Refugees and Muslims in February; Migrant Justice rallies in March; Raise the Wage press conference in March; and Migrant Justice “Milk with Dignity” action in April.

## Personnel

This year, we welcomed two new staff members to UCM: Liza Earle-Centers began as our Acting Director of Religious Education on August 1, and Becky Atchinson began as our Office Assistant/Rental Coordinator on October 4.

I have greatly enjoyed working with all of our wonderful staff: Church Administrator, Sam Rossier; Office Assistant/Rental Coordinator, Becky Atchinson; Acting Director of Religious Education, Liza Earle-Centers; Director of Music, Dick Riley; Accompanist, Eliza Thomas; and Sexton, Bill Pelton. Their dedication to serving UCM with care and excellence is inspiring.

We are grateful to have all of our staff continuing with us next year and to be adding additional hours to the Acting DRE and Sexton positions. We also plan to hire a Communications Intern next year who will help us to better utilize our website and other systems and technologies to communicate both within our UCM community and with the broader world.

One note on the Acting DRE position: Liza’s position this year was a one-year position. Next year’s position will also be a one-year position as we discern the future staffing structure for our religious education programs for children, youth, and adults. I am grateful to Liza for helping us maintain our dedicated team of volunteers and excellent programming during this time of transition.

Please read the Personnel Committee report for further information on personnel-related matters.

## Executive Team

I am grateful to all members of the Executive Team for the attention they give to the operational matters of the church. Ron Cameron, Judith Hinds, and Paul Wallace-Brodeur have been an excellent team to work with as they have brought a great deal of thoughtfulness, thoroughness, fairness, clarity, and focus to our ministry together. *You can read the Executive Team report for more details of the various issues and priorities the ET has addressed since August.*

I am especially grateful to Judith for her service on the ET which will be ending at the end of June. Judith has offered us all her institutional memory, her clarity on procedures and policies, her organizational skills, and much of her time in service to UCM. Please join me in thanking her! And, we are grateful to welcome Jeanne Richardson to the ET beginning July 1.

I would also like to note that we have also experienced very good financial health this year with increased income from unpledged donations and the Sunday pouch and a very successful 2017-2018 pledge drive that puts us in good standing to support programming and staffing to fulfill our mission and strategic plan goals. I believe that this is a good sign for our congregational health as we continue to experience growth in the congregation.

#### Governing Board

I meet monthly with the UCM board as an ex-officio member. For each board meeting, I prepare a written “minister’s report” that summarizes my activities, accomplishments, and challenges from the preceding month. (These reports are available upon request.) Acting as liaison to the Executive Team and staff, I regularly report on board activities to the Management Team and ask for their feedback on matters the board might be taking up.

This year, it was a joy to partner with the board in further developing our use of policy-based governance and exploring big questions like how is UCM growing and how are we taking steps to achieve our vision.

As the board becomes even more confident in the policy governance model, it will be able to more fully engage the bigger picture questions, visioning, and long-range planning that it is tasked with on behalf of the congregation. As UCM continues to grow - not just in numbers but also in spiritual depth and community impact, these roles will be even more important.

#### Denominational Activities

Staying connected to our larger religious movement and association helps all of us to remember the covenantal nature of Unitarian Universalism and to gain perspectives on the life of our congregation. To that end, I participated in a variety of denominational events this past year. I attended a retreat for UU clergy in the New England region in the fall and the UUA New England Regional Assembly this spring. I also attended the installation service of a colleague in St. Johnsbury, VT in April. Throughout the year, I regularly met with two virtual clergy support groups that utilize online technology for our gatherings. The third week of June, I will travel to New Orleans, LA for our denomination’s annual General Assembly where I will serve as a GA Chaplain.

#### Conclusion

I want to thank the congregation for all the ways each of you contributes to the life and ministry of this spiritual community. The upcoming year will no doubt bring with it its own dynamic changes, and I am confident that together we will navigate these changes with compassion, guided by our shared mission and our shared vision of who we want to be and how we want to transform ourselves and the world.

With love and gratitude,

Rev. Joan Javier-Duval  
Minister

## **Governing Board**

The board is busy planning and preparing for our Annual Meeting set for Sunday, May 21. We continue to support our Minister and deepen our understanding about “policy governance” as we delve deeper into the Dan Hotchkiss book “Governance and Ministry”. We have looked at all our church policies and separated them into board governance policies and operational policies. The board is responsible for governance policies and the Executive Team is responsible for operational policies.

Agenda items thus far this year includes the following: Board Growth Study; Board Monitoring of our Strategic Plan Outcomes; Getting clearer on board roles and responsibilities; Increase communication among the executive team and members and friends of the church via Fireside Chats and letters from the Board in the enews; Sexual Abuse Policy; Planned Giving Policy; Dialogue with ET, Finance, Leadership, and Stewardship and Property Committees; Considering a Joint Resolution of support between UCM and the Washington Church; Creating more dialogue on diversity in our church and within our personnel policies.

Special thanks to those members who have shared their vision and concerns at our Fireside Chats with the board set for the first Sunday of each month after the service. Please continue to offer ideas as to how we can best communicate with the congregation. Your contribution to celebrating and addressing all of our church needs is greatly appreciated. We welcome all!

Sincerely,

The Governing Board of the Unitarian Church of Montpelier

Jo Romano, President

Melinda Moz-Knight, Vice-President

Will White, Secretary

Nancy Read, Financial Officer

Priscilla Fox, Member at Large

Paul Hartmann, Member at Large

Jennifer Payne, Member at Large

## **Church Administrator**

The mission of the administrative staff is to provide essential support services to other professional staff, committees, task forces, and other groups involved in carrying out the ministries of the church. The administrative staff endeavor to furnish appropriate technical, clerical, and physical facilities, supports, and environments to assure that the staff and volunteer leaders can achieve their purposes.

Some of the key tasks and responsibilities carried out by the administrative staff are:

Data storage and retrieval; maintenance of membership and attendance statistics; maintenance and updating of the chart of accounts; financial statements and budget reports; accounts payable and receivable; administration of payroll and employee benefits; retention of insurance documents and policies; tax filings; website maintenance; maintaining schedules and calendars of events and activities; rental of the church building; upkeep of telephone and computer networks; publication of printed worship materials; publication of a church directory.

The significant change in the church office during this year was the departure of Bettie Barnes as Office Assistant/Rental Coordinator and subsequent hiring of Becky Atchinson in that position. Both Bettie and Becky bring their own unique skills and style to the job, and each of them is very much appreciated. With changes come new challenges and opportunities, and Becky and I look forward to meeting the challenges and taking advantage of the opportunities.

Just a few highlights of this year include:

Creation and implementation of an email list to serve the Social Responsibility Committee; acquisition of a new copier/scanner; transition to a new website; set up of a file server for staff, board and management use; joining the online "Church Law and Tax Support Program"; subscribing to several Church Management newsletters; initiating research on options for live streaming worship services

Respectfully Submitted:

Sam Rossier  
Church Administrator

## **Executive Team**

Members: Rev. Joan Javier-Duval, Ron Cameron, Judith Hinds, Paul Wallace-Brodeur. After serving on the ET for the past six years, Judith will be stepping down at the end of June. Jeanne Richardson will join the ET beginning July 1. Rev. Joan, the ET, and staff wish to thank Judith for her dedicated service to the congregation in this capacity, for being our institutional memory, and for the clarity and focus which sustained the ET through times of transition.

Purpose: The role of the Executive Team (ET) is to manage the affairs of the Church at an operational level. Unlike the Board, the ET does not make broad policy or set goals for the Church. The ET operates by consensus and is convened by the Minister.

Management Team. We continued to meet regularly with the professional staff as a combined Management Team (MT). We all value the combined lay and professional perspectives provided by this model. The MT established priorities for the year, which included providing support and guidance for all committees in their efforts to advance Strategic Plan outcomes and action steps.

Committees. We met with and/or received reports from all committees, task forces, and ministry programs. We provided support to several committees as they tried to clarify their roles and strengthen their lay leadership. Joan and Liza worked closely with both RE committees in their first year of assessing the direction and needs of the overall RE program.

Management Policies. The ET/MT continues to manage operational policies, which are posted on the church website. The Board has reviewed these policies to ensure they are consistent with UCM's mission and executive limitations. We established a new Weapons Policy and approved updates to several others. We are working on guidelines for how best to provide financial assistance to UCM members who wish to serve as delegates to the UUA General Assembly.

Budget and Finances. We received regular reports from the Finance Committee, and worked with the F.C. on development of next year's proposed budget. We recommended to the Board and congregation that UCM continue with an Acting DRE for a second year, increasing the hours slightly, and that the Sexton position be increased to 14 hours/week. We commend the Stewardship Committee (now under the direction of the Board) on a fully successful pledge campaign!!!

Joint Efforts with the Board.

Three joint Board/ET meetings were scheduled during the year. The ET structured all committee annual reports to assist the Board in assessing progress on the Strategic Plan. While the Board was conducting its growth study – the first step toward accommodating our growing congregation – the ET developed some temporary partial solutions to create more seating and improve traffic flow on Sunday mornings. We hope to experiment with adding a live video feed of the service and to try out having two services on a few Sundays next year.

## Church Records.

Sam created a system of folders on the church network server so that the ET and Board can store records (meeting minutes, policies, and other significant documents) in a central location, accessible by staff and lay leaders. This system will make it easier to look up previous decisions and keep track of legal documents such as contracts.

## **Committee of Chairs (CoC)**

Members: Chairs and leaders of committees, teams, task forces, and major projects; with representation from the Board, Executive Team, and professional staff. Meetings are planned and facilitated by volunteer teams from within the group.

Purpose: Mutual exchange of information, opportunities for leadership training, and a voice in church governance.

The CoC met three times this year in October, January, and April. Topics included strategies for fulfilling the church's 2020 Strategic Plan; church finances; our most meaningful spiritual experiences (led by the RE Committees); and training on how to conduct spiritually grounded and compassionate gatherings (led by the Committee on Ministry).

## **Director of Music and Music Committee**

Music Committee: Donia Prince, Chair; Dave Grundy, MaryJean McKelvy, Eric Oberg, Cecile Sherburn, Lindsay Wade. Richard Riley and Eliza Thomas, ex officio

The sanctuary space in our church is associated with beautiful sound. Much of that comes from music made by our choir and pianist/organist Eliza Thomas. Recently the church has also become the site for after-service drumming and the Solidarity Singers. Both groups meet twice a month. UCM is also one of the region's most sought-after places to hold a concert. Approximately 40 such concerts have, or will, happen during the 2016-17 church year.

Twenty nine UCM singers have sung with the UCM Choir this year. They are (names in the order of the part they sing) Sopranos: Didi Brush, Beth Damon, Paula Gills, Kairn Kelley, Fran Krushenick, Catherine Lowther, MaryJean McKelvey, Charlotte Root, Ginny Sassaman, Cecile Sherburn, and Joan Stepenske. Altos: Hedi Ballantyne, Liz Benjamin, Gail Falk, Bronwyn Fryer, Nan Prince, Susan Bull Riley, and Sue Stukey, Lindsay Wade. Tenors: Mary Alice Bisbee, Sarah Hooker, Ed Hutchinson, Eric Oberg, Donia Prince, and Ted Richards. Basses: Dave Grundy, Phil Morse, Bill Paine, Bob Riggen, and Harris Webster. The Choir holds an annual retreat in late August.

At least 11 guest musicians have participated in services. (I have forgotten a few - my apologies.) They include cellist Deborah Black, dancer MC DeBelina Doyle, violist Elizabeth Reid, and singers Allison Devery, Fred Emigh, Anne Jameson, Carolyn Morton, Heather Moz, Araceli Rebmann, Stuart Williams, Merideth Wright.

Percussionist Matt Meyer led the service on October 16.

A survey of the music performed by the Choir during services shows that of the 35 pieces that will have been sung by April 30:

19 were written in the 21st century - 10 classical; 11 traditional, ethnic, folk, or pop  
8 in the 20th century - 4 classical; 4 traditional, ethnic, folk, pop  
5 in the 19th century - 4 classical; 1 traditional, ethnic, folk, pop  
1 in the 18th century - 1 classical  
2 in the 16th century - 2 classical

It is a privilege to make music at UCM. The piano and organ are both very fine instruments and UCM is the finest physical space for acoustic music in Central Vermont. The church and its building inspire much participation and appreciation of music.

Submitted by Dick Riley, Director of Music

### **Director of Religious Education and the Religious Education Committee**

Committee Members: Kairn Kelley (chair), Beth Merrill, Deb VanNess, Margo Whitcomb, Theresa White, Noah Witke-Mele, Liza Earle-Centers (Acting Director of Religious Education)

Mission: The Religious Education Committee (REC), working in community, supports opportunities for transformational learning, faith formation, action, and fellowship across the lifespan within our congregation. Focus: The REC has had a dual focus this year. It continued to support the quality RE programming from past years (which included helping Liza navigate the new role as Acting DRE), while embracing the role of planning and implementing much of the RE Envisioning Process. 99 children/youth are registered for RE (nursery - high school youth group and OWL). Over 60 congregants helped RE out in some form this year.

**Sunday RE Programming:** 20 dedicated volunteer RE teachers (and several subs) led RE programs for preschool, K-1st, 2nd-3rd, 4th-5th, and 6th-8th graders. Highlights: preschoolers treasured making their own chalices to use at home, K-1st graders delighted in meeting Sam Rossier and his seeing eye dog as an example of mutual caring, 2nd-3rd graders wrote welcome greetings in Arabic for Syrian refugees, 4th-5th graders discussed the famous quotes of Dr. Martin Luther King Jr. while making table tents for Community Lunch, and middle schoolers painted t-shirts to reflect their core values and identities. We used the newly adopted Sexual Abuse Prevention, Education, and Response policy in our RE trainings this fall. Several RE

teachers and Liza participated in a UUA training on how to support gender nonconforming children and their families. The RE classes will participate in the denomination wide teach-in on white supremacy on May 7th. The average number of children in attendance in nursery - 8th grade Sunday programs is 30. If you exclude holidays/school vacations, the average rises to 37.

**Nursery:** 16 different families used the nursery during services, averaging 3-4 each Sunday.

Becky Webber continued as our adult supervisor, with 4 youth that help on a rotating basis. We created a Welcome Sheet that included short bios of the nursery staff for parents/caregivers to learn about the nursery. A subcommittee addressed the need to have the nursery be multi-purpose while still meeting guidelines for safe, clean child care space. It's great to have another accessible meeting space in the building. Groups are making use of it regularly.

**Our Whole Lives:** UCM offered a robust menu of OWL sexuality education programs this year.

5 children participated in the K-1st level. 13 children were part of the 4th-5th level. These two levels met for 7-8 workshop sessions in the fall and early winter. In late summer 6 congregants participated in weekend-long trainings for the two older youth OWLs. 16 youth participated in the 7th-9th grades OWL, with 3 facilitators guiding the 25 1.5-hour workshop sessions, including 2 overnights. 8 youth participated in the full 10th-12th grades OWL led by 3 facilitators. They had the equivalent of 12 two-hour workshop sessions, including one overnight.

The dedication of the kids and youth, the families and the 11 facilitators was tremendous and is to be commended. Parent volunteers were tremendous support in making the overnights and final celebrations happen. This valuable program aligns with our vision of fostering ethical/moral decision making and to challenge assumptions or biases within our congregation.

**High School Youth:** The youth group met about once a month. 7 different youth participated, with a core group of 3. Sue Koch has served as a dedicated coordinator, with others filling in as the second adult. Highlights include making postcards for the Love Brigade, baking at the Good Samaritan shelter on MLK Day, and the Regional Youth Gathering of four UU congregations as an overnight in Burlington. Four 12th graders are participating in the Bridging process this year.

**Multigenerational Programming:** We will have offered 6 multigenerational services by the end of the church year. Other multigenerational RE events included an evening of shared stories in November, a sign-making party for the Women's marches in January, and the beloved month of March Mystery Madness with 52 children and adults playing this annual game of making friends across the generations. In April six youth joined the volunteer crew of the Monday Community Lunch. For the first time this year, we will be coordinating a multigenerational summer camping weekend to take place July 21, 2017 at Kettle Pond in Groton State Forest.

**RE Envisioning:** Both the RE and the Adult RE Committees helped co-create a path for examining our RE program as part of a re-envisioning process. In October a consultant helped those involved with RE over the years look at our RE history and identity. In November we participated in a RE-Start Conference hosted by the UUA in which we learned about innovative RE models from other congregations. In January we charted the next phases, which included exploring the World Cafe model for leading collaborative dialogue within large groups. A trial run of the World Cafe model was the main portion of the April Committee of Chairs meeting.

We are grateful to the 30 or so participants for their openness to trying new things. We will process that information and plan to hold some kind of congregation wide conversation--including a larger World Cafe--in the fall of 2017. Mid-way through the visioning process the decision was made to extend the Acting DRE position to allow more time for this process, with the goal of moving toward programmatic and staffing decisions in the fall of 2017.

My appreciation to the entire congregation, the staff, and those involved with RE--committee members, teachers, families—who have made me feel so warmly welcomed and supported as Acting DRE. Thank you!

Respectfully submitted,  
Liza Earle-Centers, Acting DRE

## **Committee and Program Reports**

### **Accessibility Committee**

Members: Liz Benjamin, Chair; Mary Alice Bisbee, Sam Clark, Fran Krushenick, Bill Pelton, Colin Tait.

Statement of Purpose: We have not created a mission statement yet. However, we operate under these guidelines – to help the Unitarian Church of Montpelier become more accessible to and inclusive of all sorts of people; and to educate the congregation so they will be more sensitive to the physical, emotional, and spiritual needs of persons with disabilities.

This year we have discovered the Accessibility and Inclusion Ministry, a UUA program, and we are on the verge of applying for participation in it. The Chair has participated in two webinars about the program. We have had a table in the vestry two weeks a month, gathering information from the congregation about what issues are important to them related to this program. We plan to begin educational gatherings in the fall. (Vision Outcome #1.4)

We also plan to participate in next year's task force that will create a long-range comprehensive plan for accessible, sustainable physical space. (Vision Outcome #5)

We are very pleased that Rev. Joan Javier-Duval, at our request, will preach a sermon related to accessibility on May 14, 2017.

Submitted by Liz Benjamin, Chair

## **Administration Committee**

Members: Chair John Poeton, Ron Marion, Jason Boyd, Norma Raymond and Fran Dodd.

Mission Statement: The Administration Committee provides support and assistance to the Church Administrator and Office Assistant in performing their duties effectively and efficiently and furthering the church's mission and goals.

The Administration Committee meets on an "as needed" basis. The Committee has been reorganized in task teams that work with the Church Administrator on particular assignments related to finances, technology, communications and regular office tasks that require extra help or extra hands. The tasks that were engaged in this church year were assisting with financial data entry into Quick Books, bill payments, reconciliation of church finance accounts, bulk mailing, technology assistance and communication planning.

Members of the Administration Committee also participated in the hiring of the new Office Assistant in September.

Submitted by John Poeton, Chair

## **Adult Religious Education Committee**

Members: Kristin Glaser (Chair), Liza Earle-Centers (Acting DRE), Brenda Bean, Kathleen Bryant, Maryann Ludlow, and John Turner.

Mission: To offer opportunities for faith development and/or personal growth.

Focus: ARE carried out the 6 different action steps required of it by UCM's 2020 Strategic Plan as follows:

Review curricula and other materials and make a plan to deliver educational programming that offers opportunities to examine assumptions and biases within the congregation. With the Social Responsibility Committee (SRC), ARE convened a group to study the UUA's Navigating Whiteness curriculum, which is intended to cause participants to examine their assumptions and biases related to White Privilege. The group decided not to use the curriculum but did offer a 4<sup>th</sup> Monday ARE event in February about "What Does It Mean to be White Here and Now?" ARE is offering in May a discussion of the book *Waking Up White* by Debby Irving. We plan to continue to offer programs examining racial bias and systemic racism next year.

**Offer opportunities for diverse spiritual perspectives and practice beyond Sunday services.**

ARE offered the Evensong curriculum over the summer, 2016. In September ARE began its 4<sup>th</sup> Monday ARE Series, a predictable monthly opportunity for one-time ARE events. The series

included “Introduction to Women’s Spirituality & Intuitive Training”; Meditation and Sharing; “Why am I Sick and How Can I be Well?”; and Buddha Within (upcoming in May).

Lead a process to create a vision for a cohesive faith and spiritual development program. Please see the RE Committee Report for details on the shared RE Envisioning process.

Offer learning opportunities for spiritual practice and to foster ethical decision-making, Unitarian Universalist (UU) identity, understanding of other religions, faith development, and personal growth. ARE promoted an ongoing Tai Chi class/group (for spiritual practice) and an ongoing Non-Violent Communication class/group (involving ethical decision-making).

**Deliver programs which foster reflection on and sharing of our own beliefs and experiences.** Beginning in October and again in February, Rev. Joan and Kathleen Bryant co-facilitated two 4-month sessions of the UUA curriculum Soul Matters, designed explicitly to foster reflection on personal beliefs and experiences.

**Lead educational programs to examine the underlying causes of violence, poverty, racism, and the climate crisis.** The 4<sup>th</sup> Monday ARE Series event held in January 2017 was a guided discussion of the UUA Common Read book The Third Reconstruction by Rev. William J. Barber II, with Jonathan Wilson-Hartgrove. The book examines racism as promulgated through politics. We also hosted a presentation about a journey to Palestine and Israel, to more fully understand the history of that troubled region.

Submitted by Brenda Bean and Liza Earle-Centers

### **Community Lunch Committee**

Members: David Grundy, Tina Ruth, Janet Poeton, Scott Hess, Charlotte Root, Sandal Cate, Abby Colihan, John Poeton, Fran Krushenick and Chauntelle Eckhaus.

The Unitarian Church of Montpelier serves a Community Lunch in the church vestry every Monday from 11:00am until 12:30 pm. We began our mission in July of 2015 and will have served approximately 5800 meals this church year. During the past two months we have served 120 meals each week. The cost of these meals averages \$1.10 per meal.

The mission of the UCM Community Lunch Committee is to provide the best possible healthy meal in the least restrictive environment in the most cost effective manner. This mission is accomplished through the energetic efforts of a team of people, members and friends of the Church along with community members, working together to gather, store, prepare, cook and serve the food. Each Monday music is provided by Paula Gills, Nancy Smith and others, often by guests as well.

The Church is a Network partner with the Vermont Foodbank and Community Harvest of Central Vermont, the local gleaning organization. An estimated 3,500 pounds of food was

received from the Food Bank and 1,015 pounds of fresh gleaned produce was received from CHCV. Food donations from local community gardens, fresh fruit and vegetables from local stores are received during the year. Volunteers provide freshly made desserts. Compost is returned to local farmers. The Good Samaritan Haven and Another Way receive leftovers when appropriate.

We welcome volunteers for any amount of time from 8:00 and 2:00 each Monday. Volunteers also provide support with pick-ups and inventory activities during the month.

We would like to thank UCM for including the UCM Community Lunch in the budget and as a pouch recipient.

Submitted by Janet Poeton

### **Event Coordinators**

Members: Hedi Ballantyne and Linda Sproul

A.k.a. the Special Events Team, this group has continued the work of encouraging potlucks either in people's homes or at UCM. We emphasize the importance of long-time members and friends of the congregation getting to know newcomers and vice versa. This spring there was one event offered by the Social Responsibility Committee at church, and five dinners in people's homes are scheduled from April into June. We thank all our volunteer hosts.

Submitted by Hedi Ballantyne

### **Finance Committee**

Members: Paul Wallace-Brodeur, Chair; John Poeton, Rob Chickering, Bill Doelger, José Aguayo and Dan Groberg

Our Mission Statement: The Finance Committee assists the Executive Team and Board in overseeing the financial health of the Church, prepares the annual budget for review by the ET and Board, monitors the approved annual budget, oversees the long term invested funds (LTIF), and ensures that the church is properly insured.

The Committee was pleased that the 2015-16 church year ended in the black (\$3,320).

The new counting procedure that started in 2015-16 continued this year. A refresher training session for counters was held at the beginning of the year.

In November the Committee met with Ashley Ferrone and David DeBellis from our LTIF manager, The Trust Company of Vermont. David and Ashley had prepared a summary and report of our investments which was discussed and reviewed by the attendees at the meeting. Long Term Invested Funds totaled \$803,607 (\$23,495 of which in the Keve account) as of March 31, 2017. This compares to \$802,408 in the LTIF account as of March 31, 2016, even

though \$52,200 was donated to agencies in the central Vermont community following approval at the 2016 Annual Meeting and funds were withdrawn to cover current year capital expenses.

The second half of the year has been devoted to the process of preparing the annual budget. The process involves soliciting input from staff and committee chairs, preparing a draft based on that input, determining staff compensation changes, and reviewing the proposal with Church committees, the Executive Team and the Board. Following the annual pledge drive, the Finance Committee met toward the end of April to prepare a proposed budget based on actual expected income. This was followed by review and approval by the Board for presentation at the May Annual Meeting. We have the good fortune of exceeding our pledge income goal for the first time in anyone's memory. Proposed General Fund expenses for 2017-18 total \$322,483 and Capital expenditures are proposed at \$29,000 including routine building maintenance.

Special thanks are extended to the people who assume responsibility for counting the pouch collections each Sunday. This includes John Poeton, Rhoda Chickering, Nancy Sherman, RuthWallace-Brodeur, Brenda Bean, Paul Wallace-Brodeur, Dan Groberg, Bill Doelger, José Aguayo, Pat Carstensen, and Rob Chickering as a sub when needed.

Also a special thanks to Fran Dodd who continues to take on responsibility for balancing our monthly bank and Long Term Invested Funds statements.

Submitted by Paul Wallace-Brodeur, Chair

### **Church Historian**

This year, the Church History Office has focused chiefly on two areas: the church records project and "New UU" gatherings. With a grant provided by the Vermont Quebec Universalist Unitarian Convention (VQUUC), Leslie Rowell, a skilled and committed archivist, played a vital role in the project for the seventh year. Our eighth VQUUC application is pending.

**1. Records Management.** As we did last year, we continued to develop the Records Management Plan and to expand the scope of our digital records. We have continued to see benefits from using the church records gmail account and the Dropbox account for incoming materials. These acquisitions include Weekly Announcements, semi-annual and annual reports, Board, Management Team, and committee documents and images, and audio-visual materials of special projects. Significant additions to digital materials are documents from the 2020 Vision process and from the preparation of the 2020 Strategic Plan. We continue to give special attention to financial and property records.

**2. Paper Materials.** We have continued the annual accessions process for ongoing and new series of documents, and have updated the Inventory. Completing the Finding Aid, which will describe the scope of our records at the Vermont Historical Society (VHS) – transferred to VHS by Jean Cate in 1992 and by us in 2010 – and at UCM, will occur before the end of June.

**3. Cooperation with Others.** Asked by the Membership Committee, we participated in two "New UU" sessions this year, one of which was capably led by Barbara Thompson. After each

New Member Sunday, we conducted full tours of the church, from the Bell Tower Room to the basement. We provided extensive materials to Board members who were conducting a growth study, required by Outcome 5 of the 2020 Strategic Plan. And we attended three Committee of Chairs meetings, in October, January, and April.

**4. Transition.** At the end of June this year, Leslie will have completed her extensive and fruitful commitment as archivist for the Records Project. She has ably led the development of both UCM's paper and, for the first time, digital records. Two measures of her effective organizational skills and historical insight are that seven boxes of old records (from 1996 and before) were organized here and transferred to VHS in 2010, and nine boxes have been organized and stored in our Records Room during the last seven years.

Significant to the transition have been contributions from an experienced archivist and church member. She has helped shape conversations and plans for the future development and management of UCM's records. We are exploring the prospect of continuing this fruitful beginning.

Submitted by Peter W. Thoms, Historian

### **Lay Pastoral Care Ministry**

Members: Rev. Joan Javier-Duval, Pam Cameron, Bill Paine, Leslie Parr, Theresa White and Mary Jane Ohlson, coordinator.

Mission: LPCM provides a caring and supportive listening presence for the members and friends of UCM especially in times of distress due to overwhelming life events. Our goal is to support the pastoral care ministry provided by our Minister.

LPCM met monthly from August through May, under the supervision of our Minister, to provide support for one another, review the current needs of our congregation, and receive additional education. A retreat for LPCM was held at the home of Mary Jane Ohlson in August. The caregivers continued the practice of providing support and compassionate presence before and after Sunday service. Rev. Joan and caregivers visited members and friends at home and in hospitals, nursing homes and assisted living facilities. One of the main areas of pastoral care ministry was providing support to family and friends taking care of their loved ones. LPCM also coordinated additional services with the Caring Network for meals and transportation as needed or when requested.

We thank Nancy Read for her four years of service. She shall be missed

We will continue to integrate with the Caring Network, explore ways of meeting the pastoral care needs of our UCM community, and continue to further educate and support each other in this work of service.

Submitted by: Mary Jane Ohlson

## **Leadership Development Committee**

The Leadership Development Committee (LDC) finds individuals who will take the responsibility of leadership in the activities of our church, most especially in support of the church mission and Strategic Plan. The LDC has identified four nominees for the Board with the help of our minister. The members of the committee are changing. In the coming months we will continue to seek learning and development opportunities offered by the UUA and to provide financial assistance to UCM's delegates to the General Assembly.

Submitted by Bill Doelger, Chair

## **Membership Committee**

Members: Hedi Ballantyne, Abby Colihan, Sue Gilmore, Judith Hinds, Dave Peters (Chair), Art Stuke, Colin Tait, and Barbara Thompson

Mission Statement: The Membership Committee provides welcoming and outreach to newcomers, members, and friends of the Church with the intention of fostering a sense of belonging in our spiritual home. Our mission statement supports and complements UCM's mission to "welcome all as we build a loving community to nurture each person's spiritual journey."

Since May, 2016 we have:

- Conducted and evaluated New UU classes in Fall, 2016, and Spring, 2017;
- Helped 24 people become members of the church;
- Worked with other committees in support of Vision Outcome #1 regarding inclusivity;
- Made follow-up calls to new members and others who have visited the church;
- Conducted two New Member Sunday programs;
- Published an updated church directory with support of the UCM administrative staff;
- Been supported by Rhoda Chickering in managing ushers, Ellie Peters in managing coffee hour, Pat Carstensen in managing the greeters, and Janet Poeton in managing elevator operators;
- Recognized volunteers in the weekly Order of Service;
- Staffed the Hospitality Table, providing both information and name tags;
- Welcomed newcomers at coffee hour and initiated a Vestry Host program;
- Replenished pew cards on a regular basis;
- Provided a potluck event for new members;
- Maintained the rear entrance bulletin board;
- Processed requests for receipt of the UCM eNewsletter

The Membership Committee would welcome additional members. Please contact any member of the Committee if you would like more information or to attend one of our monthly meetings.

Submitted by David Peters, Chair

## **Committee on Ministry**

Members: Rev. Joan Javier-Duval, Brenda Bean, Danner Friend (vice-chair), Emily Seifert (chair), Sue Stukey, Peter Thoms. Members serve terms of 3 years.

Mission: The Committee on Ministry (CoM) supports and nurtures the shared ministry of UCM by:

1. Serving as a support and sounding board for Rev. Joan.
2. Serving as a resource for individuals and groups in the congregation to:
  - a. foster healthy process, relationships & decision making;
  - b. address conflicts or troubles that negatively impact ministry; and
  - c. consult with the minister on matters of ministry.
3. Making recommendations to the church's governing bodies and other leadership groups to enhance the health and effectiveness of ministries.
4. Conducting a mid-year and end-of-year performance assessment of the minister, coordinated with the UCM Board, and submitted to the UUA.

Activities and accomplishments:

- Pam Cameron finished her term in June, 2016. We welcomed Peter Thoms in August, 2016.
- The CoM met monthly with Rev. Joan, providing an opportunity for her to reflect on her ministry, professional development, congregational dynamics, and relationships. We offered guidance where appropriate on prioritizing her workload, and encouragement toward finding a sustainable balance between work and family time.
- Our focus this year was on the 2020 Strategic Plan's Vision Outcome #2, Action Step #5: "...ensuring that committee chairs and other leaders are trained to facilitate gatherings that are spiritually grounded and compassionate." We met with the Committee of Chairs (CoC) in October to explore what "spiritually grounded" and "compassionate" mean to each of us, shared what we are doing to foster these experiences, and discussed what more we would like to learn or do. At the January CoC meeting, we offered three different sessions on topics requested in October: covenants; effective meeting facilitation; and resources for leaders. At April's CoC meeting, participants shared how they have implemented the information and tools learned in January. We were delighted with the lively engagement of UCM's leaders, and the progress that we collectively made toward our 2020 Vision. The CoM will continue to seek out ways to support committee chairs and program leaders in developing their skills so that our vision of a loving spiritual community may be realized.
- We will complete our year-end evaluation of Rev. Joan's ministry by June, 2017. This is the second of three yearly evaluations submitted to the UUA's Ministerial Fellowship Committee as Joan advances toward Final Fellowship. This is an opportunity to look back at our year of ministry together, and to discuss Joan's strengths and areas for growth. We will also reflect upon our congregation's engagement in and ownership of various areas of ministry, and how we may deepen and grow on our spiritual journey together.

Submitted by Emily Seifert, Chair

## **Music Committee**

Please refer to the Music Director's report.

## **Personnel Committee**

Members: Reverend Joan Javier-Duval, Jennifer Payne, and Robert Youngberg

The Personnel Committee continued to see turnover in its membership. In the past year we have had five members come or go from the committee. We are in need of members who have experience in Personnel and HR work.

The new Federal Labor Standards Act (FLSA) Overtime Rule that was supposed to go into effect last December prompted the committee to look at the church's employee job classifications. The committee guided the staff to realize that FLSA does apply to most church employees except those that fall under the Ministerial Exception (Minister, DRE, and Music Director). The committee then reviewed job descriptions, job classifications, and compensation categories. The need for some positions to move from a salary to hourly compensation was evident. The committee, along with staff tracking their hours, will be looking closely at each position in the upcoming year to learn more about the actual hours being put into each position.

The committee worked with the Finance Committee to review and recommend salaries for all the staff according to UCM and UUA Fair Compensation Guidelines. We are meeting the guidelines of both documents/practices.

The committee has begun drafting a document that will outline hiring procedures for any UCM position.

Submitted by Jennifer Payne, Chair

## **Property Committee**

Members: Paul Ohlson, Chair; Peter Thoms, Vice Chair; and a changing cast of project-based volunteers.

Mission: Protect and maintain the church in keeping with historical integrity and current needs.

The past year has seen the following projects completed:

1. The organ bellows fan & motor in cellar were boxed in for safety reasons.
2. Staging was constructed and the ceiling above the organ was opened for access.
3. Insulation was added above the organ and between the sanctuary and the addition.
4. A grounded electrical cable was added from the entrance panel to a new sanctuary sub-panel.
5. LED dimmer switches were added at the new sub-panel for all sanctuary lighting.

6. Three recycled benches (gift of Living Lighter Committee) were installed and secured on the School Street lawn.
  7. School Street steel railings on the ramp had their rusted feet replaced with stainless steel.
  8. New interior signage that meets ADA requirements was fabricated and installed.
  9. Added new mobile coat rack to Vestry to alleviate Sunday coat hanging congestion.
  10. Various interest groups were brought together to consider future needs (Property Symposium).
  11. UCM's 20 Year Maintenance Plan, now in its fourth year, continued to guide our work.
- Projects to be completed in May and June (subject to budget and contractor availability) include:
1. Painting of the original wood flooring beneath the pews in the sanctuary.
  2. Replacement of worn and degraded floor covering in the front entryway and foyer.
  3. Stripping and refinishing Vestry and Fireplace room hardwood floors.
  4. Installing three safety-code-approved handrails in the Vestry and choir hallway.
  5. Engineering and surveying work done prior to leveling basement floor (courtesy Norwich University).

Submitted by Paul Ohlson, Chair

### **Religious Education Committee**

Please refer to the report of the Director of Religious Education.

### **Response Team**

Members: Jenny Beaudin, Liza Earle-Centers, Rev. Joan Javier-Duval, and Peter Thoms

The church's Response Team (RT) was established in the Fall of 2013, when the Executive Team approved the policy on Sexual Abuse Prevention, Education, and Response (SAPER).

The Team is responsible for educating the congregation about the policy, and for implementing it by responding to allegations of sexual abuse and misconduct within the church community, and to address the presence of anyone in the congregation who has either been convicted of a sexual offense or who is known to have engaged in such conduct.

Given the extensive revision process, outlined in last year's report – which hadn't been completed by then (April 30<sup>th</sup>) – the chief purpose of this report is to describe the completion of that undertaking.

Members of the Response Team met with Board members in June and again in September, when policy revisions were formally approved. Among the significant changes were those dealing with mandated reporting (to be in accord with state law), the proscription on anyone at UCM investigating sexual abuse allegations (they are the responsibility of the Dept. of Children and Families), and providing for the temporary suspension of UCM staff and/or the minister if serious allegations of sexual abuse occur.

Team members also completed a full review of useful resources in several appendixes at the end of the document.

Finally, RT members – who are responsible to offer education to the congregation on the policy – reviewed and approved the SAPER “Snapshot.” It offers an engaging way for members and friends to appreciate the essence of UCM’s policy and practices in this aspect of church life, designed to ensure the protection of our children and youth. The SAPER policy and “Snapshot” are on UCM’s web site, here:

<https://ucmvt.org/about/by-laws-and-governance/management-policies/>

In the coming year, RT members will offer further educational opportunities for all.

Submitted by Peter Thoms

### **Safety Committee**

Members: Lindsay Wade (Co-Chair), Tina Muncy (Co-Chair), David Armstrong, Sue Gilmore.

Mission: We affirm the belief that our congregation must maintain a safe and secure atmosphere where people will feel welcome.

Activities this year:

1. Developed a draft for Appendix A that the Safety Committee and Executive Team accepted and added to UCM's Disruptive Behavior Policy
2. Established a procedure for an “extra” person (aka roving usher) during the service to provide supervision in the vestry and deal with any visitors who don’t wish to attend the service. As well as, gathered volunteers willing to take up this position until the end of the year.
3. Discussed getting a defibrillator. So far, because of expense and our proximity to the fire station, this idea has not been acted upon.

Submitted by Tina Muncy

### **Small Group Ministry**

Coordinating Team and Facilitators: Rev. Joan Javier-Duval, Ron Cameron, Danner Friend, Tina Ruth, Lydia Lowery Busler, Kairn Kelley, Becky Webber, Ultan Doyle, with Sue Stuke, Pam Cameron and Mary Jane Ohlson as coordinators. Facilitators meet once a month with coordinators for support and education.

Our Mission Statement: To provide a safe, non-judgmental space for:

Community: getting to know others in the congregation more deeply

Spiritual Reflection: exploring questions of meaning and ultimate concern by listening deeply to one another and speaking from our own thoughts and lives.

Service: joining in service to our church and/or community together.

The Fall of 2016 we offered three groups. Two of them happened with 6-8 participants in each group with two facilitators. In the Spring we again offered three groups with two filling. There is a need for a daytime or Saturday group but they rarely have enough people. At least 6 participants is important. All our groups do a service project either for our church or the community.

Sessions topics have been written by Rev. Joan, Pam Cameron, Lydia Busler and Mary Jane Ohlson. The 7<sup>th</sup> session is written by the group.

Submitted by: Mary Jane Ohlson

### **Social Responsibility Committee**

Members: Core members include Mark Hughes and Ansel Ploog, co-chairs; Hedi Ballantyne, Mary Alice Bisbee, Margaret Blanchard, Diane Fitch, Ginnie Humphreys, Fran Krushenick, Sue Rikken, Vicky Viens, and Harris Webster. At least 20 others participate in various projects and receive updates through our listserv.

We are placing people at the center of our social justice work; hopefully facilitating conversations within UCM about current justice issues and also grounding our efforts in the lived experiences of community members. Our meetings this year have been largely focused on our Vermont community and how it is affected by global issues of refugee resettlement, homelessness and poverty, and white supremacy.

We have collaborated with Adult RE this year to publicize the UUA Common Read, Rev. Barber's *The Third Reconstruction*, and to provide copies of the book for the UCM congregation. We support the work of VIA and hope to do so more in their current campaign to end homelessness in Central Vermont. At our meetings this year, we have had productive discussions about dealing with an increase in threats to vulnerable people and the ways we are staying spiritually grounded and committed to social justice. We have learned about immigration issues in VT through the Central Vermont Refugee Action Network, initiating a conversation at UCM about participating actively in the new Sanctuary movement. Through our connections to Justice for All, we have learned the details of the Fair and Impartial Policing Policy as it has moved through the Legislative session and we have supported the passage of HB.

The Social Responsibility Committee at UCM continues to improve in our communications. The implementation of our listserv at the beginning of the church year has been helpful in distributing information to interested people. In the past couple of months, we have cleared out the outdated or inappropriate books in our lending library and posted up-to-date information on our bulletin board, with the intent to connect with the congregation in the vestry. We hope to engage more congregation members in social justice through education and providing current information on the various ways to support social justice organizations and their work.

Submitted by Ansel Ploog

## SPUDS

Coordinator: Nancy Schulz

SPUDS, a community service initiative launched in January 2011 at UCM, is a loose acronym that stands for “Service is our Prayer Buddies.” Volunteers can sign up to attend monthly work outings that benefit non-profit organizations in central Vermont. Some volunteers assist once, others come occasionally, and still others attend frequently. SPUDS work outings typically last three hours.

In the 2016-2017 church year, the following received assistance from SPUDS volunteers: Habitat for Humanity (on two occasions), Montpelier’s Peace Park and Hubbard Park, Additional Recyclables Collection Center, Days for Girls, Capstone Community Action, Kellogg-Hubbard Library, Montpelier Senior Activity Center, and Cross Vermont Trail Association.

Since SPUDS was launched, 190 people have attended at least one of the 68 SPUDS outings and 40 recipients have been served by SPUDS volunteers. If you have a suggestion for a place that would benefit from a visit by SPUDS volunteers, please contact SPUDS Coordinator Nancy Schulz at (802) 223-7035 or via email: SaddleShoes2@gmail.com.

Submitted by Nancy Schulz

### Stewardship Committee

Members: Dan Groberg, Chair; Scott Hess, John Poeton (emeritus); and the Planned Giving Subcommittee – Brenda Bean, Paul Ohlson, Peter Thoms.

The Stewardship Committee is tasked with nurturing, caring for, growing, and protecting the resources of the church, and inspiring the spirit of generosity within the congregation. Together, we use our resources to craft lives of meaning and purpose. As we work to carry out the UCM Strategic Plan, the Stewardship Committee stands ready to support this vision and ensure that there are adequate resources to fulfill this vision.

The Stewardship Committee has wrapped up an incredibly successful year. This year, the Stewardship Committee introduced several new initiatives related to the **Pledge Drive**, including a well-received kickoff dinner and a shortened 15-day pledge period. We have also worked to increase recognition given to UCM’s many generous financial supporters. This year’s Pledge Drive, “A Beacon of Hope,” was the first in known history to exceed the pledge goal, with more than \$264,000 in commitments, an increase of more than 10% from last year.

One recommendation of the Task Force for the Future (January 2015) was to renew UCM’s commitment to developing an effective **planned giving program**. The endeavor had been active in the late 1990’s through the mid-2000’s. The Planned Giving Subcommittee was formed in the fall of 2015, when seven planned gifts were in place, all established before 2008. By the end of April of this year, the following had been undertaken and accomplished:

- Development of the Planned Giving Policy and subcommittee responsibilities, and approval of both by the Board in January 2017
- Through meetings with the Board and after approaching individuals and families, the Planned Giving Program now includes twelve formal planned gifts and nine commitments to make formal plans by specific dates. Plans include wills, trusts, retirement accounts, and UUA sources. While circumstances may change, the current value of commitments is in the range of \$350,000-\$500,000.
- Thanks to highly skilled contributions from church members – Annie Tiberio Cameron (photography) and Brian Prendergast (graphic design) – it is anticipated that a brochure will be published and available before the end of the church year. It will have pictures and quotations from individuals and families who are planned giving participants, as well as essential giving information. Intended to encourage many in the congregation to make planned gifts, it will be widely distributed.

Thank you to everyone who does so much to support the life and work of UCM!

Submitted by Dan Groberg, Chair

### **Vermont Interfaith Action Committee**

Members: Hedi Ballantyne, Mary Alice Bisbee, Ginnie Humphreys, Fran Krushenick, George Plumb, Nancy Potak, Harris Webster (Chair).

Mission Statement: We are a committee of the Unitarian Church of Montpelier working to serve human need and protect the earth our home by focusing on and working for systemic change in our society through the principles of community organizing. Our church is a member of Vermont Interfaith Action(VIA), a state-wide organization with similar goals utilizing the principles of community organizing.

In last year's late summer retreat, our UCM VIA agreed we would primarily focus on and support the Central Vermont's VIA (CVIA) Campaign to 'End Homelessness in Central Vermont by 2020.' We also agreed to support VIA's Clergy Caucus goal of increasing the minimum wage.

We supported this 'End Homelessness'' campaign in various ways, including many of us attending CVIA meetings, supporting two of CVIA's Actions by getting a sizeable number of UCM members outside our committee to attend these Actions, and having the Community Pouch designated to support the homeless. We arranged for two recently-housed, former homeless people to present to our congregation testimony about their move out of homelessness.

Our major activity was organizing our committee and our congregation to advocate that the Vermont State Legislature pass a \$2.00 Occupancy Fee for hotels and motels to be designated for more affordable housing, increased rental subsidies, and more services for recently-housed homeless. Our committee members had several face-to-face meetings with our state legislators, including the Speaker of the House, and attended appropriate committee meetings and press conferences. For several weeks during coffee hour we passed out Faith-in-Action Guides to encourage and help our congregation to contact their legislators. In total about 20 people

reported that they had contacted legislators and over 20 people from our congregation signed up as Friends of UCM VIA's Effort to End Homelessness. Overall we estimate that we doubled the number in the congregation who did contact legislators this church year over last year.

However the \$2 Occupancy Fee failed. At this moment there is a housing bond initiative still alive which we will work on. We know systemic change is difficult work and our efforts sometimes fall short, but our UCM VIA believes our efforts were still worthwhile and we will continue to work harder next church year, including trying to expand the number of us who contact state legislators in order to foster the systemic change that will serve human need.

### **Welcoming Congregation Committee**

Members: Anne Ferguson, Ellie Peters, Nancy Schulz (chair), Lindsay Wade

The Welcoming Congregation Committee exists to guide UCM to become ever more welcoming to individuals who self-identify as lesbian, gay, bisexual, transgender, queer, and questioning. We explore ways in which all those connected to the church (minister, staff, church members and friends) as well as all policies and programs can become friendlier to the LGBTQ community.

During the 2016-2017 church year, new member Lindsay Wade joined the Committee and Tina Muncy left to devote more time to her work as a member of the Montpelier School Board.

In January, the Committee offered a worship service at UCM that was entirely devoted to LGBT concerns. UCM's music director was very receptive to the Committee's request for specific pieces of music and the choir did an outstanding job, which enhanced the overall impact of the service. The success of the service was a direct result of the many hours that Committee members devoted to planning every aspect. This was the third worship service that the Committee has organized over a period of four years.

In February and March, at the request of the Committee, UCM member Mara Iverson facilitated two "Safe Zone" workshops as a way of helping members of the UCM community and the greater community become familiar with current LGBTQ terminology, protocols, and issues. The workshops were very well received.

For the fourth consecutive year, the Committee partnered with the Kellogg-Hubbard Library to organize a series of discussions about LGBTQ books and films. The 2016-2017 church year featured the true story Becoming Nicole by Amy Ellis Nutt, the novel Call Me by Your Name by Andre Aciman, the documentary film From Trauma to Activism and the novel Under the Udala Trees by Chinelo Okparanta.

It is through the Welcoming Congregation Committee that church space is provided at no charge twice a month for a social evening for LGBTQ youth ages 13 to 22. The program, called Friday Night Group (FNG), is organized by Outright Vermont, the statewide advocacy group for LGBTQ youth. The chair of the Welcoming Congregation Committee is a volunteer facilitator

for FNG. New youth, especially transgender youth, continue to find their way to this friendly and affirming space.

The Committee arranged for Outright Vermont's Director of Programs, Erika Meierdiercks, to speak at the April meeting of the Women's Alliance. Erika so engaged the attendees that she was given twice as much time to speak as was originally allotted.

Our Committee's current focus is gathering a long list of LGBT facts and quotes with the intent to place one in every issue of the UCM e-news beginning in September. The hope is that a steady stream of brief quotes and facts will increase the congregation's knowledge and awareness of the LGBT community.

Submitted by Nancy Schulz

### **Women's Alliance**

Officers: Sandal Cate, President; Nancy Ewins, Vice President; Tina Ruth, Secretary; Abby Colihan, Treasurer; Fran Krushenick and Mary Alice Bisbee, Programs. The Alliance has 25-30 dues-paying members.

Function: The Women's Alliance is open to all and meets on the first Tuesday of each month of the church year starting with a potluck dinner at 5:30, followed by a program and business meeting. About 20-25 people attend our meetings. We serve the church in several capacities: as a social and educational group, as a fundraising arm of UCM, as a caring community, and as hosts for church receptions as needed. We fully endorse the UCM Strategic Plan and will continue to seek ways to support the outcomes.

Programs offered: We hosted the December Holiday Fair celebration supper followed by holiday music from a few church members. We cancelled our January and February meetings due to bad weather. In March Tina Muncy spoke about her trips to Bhutan and related her stories to refugee resettlements in the Burlington area. In April we heard from Erika Meierdiercks, the director of programming at Outright, VT. For May we will focus on the UCM Strategic Plan and ways in which the Alliance can best support church initiatives in some areas. Our June meeting is a picnic with discussions of summer activities by members.

Donations: We make several financial donations to UCM and other area non-profits each year. In addition to the contributions listed in the midyear report we donated \$200 towards purchasing copies of *Lifting our Voices*, \$100 to the coffee hour fund, and we pay for insuring the Gilman painting. We will organize the spring rummage sale and an I-89 "coffee break" fundraiser. We solicit help from the broader UCM community in our fundraisers. We create an annual budget and work to see that it stays balanced. We maintain our own audited savings and checking accounts.

Submitted by Sandal Cate, President

### **Worship & Arts Committee**

Members: Leslie Parr, Sarah Hooker, MaryJean McKelvy, Joanna Meyer, Mary Chris DeBelina Doyle, Ginny Sassaman, Ron Cameron, Bill Paine (chair). Rev. Joan Javier-Duval, Minister,

Liza Earle-Centers, Acting Director of Religious Education, and Dick Riley, Music Director ex-officio.

Our Mission Statement: “The Worship & Arts Committee is the steward of the Sunday service. In collaboration with the minister, music director and religious education director, we strive to ensure that elements of the service -- music, meditation and prayer, joys and concerns, readings, announcements, the sermon -- nurture each person's spiritual journey. The committee is responsible for assuring the pulpit is full on Sundays when the minister is away, whether by guests or with special services led by members of the church. We coordinate service elements such as flowers, candles, and multimedia offerings with a dedicated budget.”

Worship services have been at the heart of our spiritual community. The words and the music of the worship experience nurture our spiritual journeys both individually and collectively. Our services help foster a sense of caring, an awareness of human need and concern for our home, the earth. That experience may transform us “toward our better selves,” call us to service and develop our sense of connectedness. We strive to make the services welcoming.

With some new members on our committee, we’ve been enjoying new energy and new perspectives. W&A continues to help plan services with Rev. Joan Javier-Duval using monthly themes. We enjoy working with Music Director Dick Riley, and Liza Earle-Centers as acting DRE. Rev. Joan presented and guided training for committee members who are filling the weekly role of Worship Associate. We are in the process of making the Worship Associate an independent program with W&A and ministerial supervision. Beth Damon continues to work with W&A to present lovely flower arrangements on a very modest budget.

In addition to helping to shepherd weekly services, W&A has participated in planning special services. In the fall, highlights included Matt Meyer in a music focused service, a multigen Diwali service, and the annual “To Say Their Names” service -- featuring Carolyn’s Angel Band hospice choir. W&A presented lay-led services on both Christmas Day & New Year’s Day. Spring highlights included UCM’s own Deb Robinson on economic justice. We assembled a service titled “One Wild and Precious Life” featuring several congregants spanning nine decades. We assisted Liza with a multigen service telling the story “Strong is What We Make Each Other” in song and theatre. Music Sunday this year featured a piece called “Luminosity” with organ, solo viola, and dance (with our own Mary Chris DeBelina Doyle)! In April, UCM member Dr. Jeremiah Eckhaus presented a sermon called “A Physician's View of Suffering and Healing” in conjunction with April’s theme -- Healing.

One of our tasks in the strategic plan in 2017 is to explore summer service offerings. We’re currently planning a few evening summer vespers services with our Music Director and music committee. We will also help present a Sunday service for the summer camping trip. Peter Thoms and Pat Carstensen will continue coordinating Quaker Meeting / Meditation on Sunday mornings this summer. We are also meeting with Adult RE on other possible offerings.

Submitted by Bill Paine, Chair

## **Pledge List**

We are very grateful to more than 170 members and friends for their generous support of the Unitarian Church of Montpelier. List as of April 23. Thank you to additional pledgers after this date.

### **Visionaries**

Anonymous

Dee Montie and Murray Evans

Scott Hess and Amy Willis

Paul and Mary Jane Ohlson

Art and Sue Stukey

### **Sustainers**

Ted Allen

Mary Alice Bisbee

Jason Boyd

Lou Cherry

Barbara Conrey and Paul Hartmann

Ellen Doyle

Jared Duval and Joan Javier-Duval

Priscilla Fox

Judith Hinds

Brenda Bean and Phil Morse

Nancy and Michael Read

Paul and Ruth Wallace-Brodeur

Susan Weber

Will and Theresa White

### **Supporters**

Anonymous (2)

Erin and Jose Aguayo

Margaret Blanchard

Ronald and Pamela Cameron

Chauntelle Eckhaus

Anne Ferguson and Nancy Schulz

Steve Finner

Danner Friend and Marianne Mullen

Dan and Mary Margaret Groberg

George Plumb

Lucinda McCloud

Beth Merrill and Josue Montalvan

Jen and Dan Miller-Arsenault

Ann Moulton

Nancy Sherman

Deborah Van Ness and Carl Witke

### **Additional Pledgers**

Anonymous (50)

David Abbott

Michael Badamo

Hedi Ballantyne

Marsha Bancroft

Woody Belt and Jennifer Payne

Liz Benjamin

Julie and John Bond

Katherine Bovey

Gerow Carlson

Rob and Rhoda Chickering

Nancy Chickering and Kris Hammer

Jan Childs

Richard Colombo and Jim Morris

Joanne Crowley-Watkins

Julie and Paul Curtin

Betty Davis

Kiley Donlan-Kite and Kim Kite

Amy Donald

Liza and Lincoln Earle-Centers

Dr. R. David and Mrs. Darragh Ellerson

Sarah Franklin

Danette Fuller

Kirk Gardner

Leane Garland

Paula Gills

Steven Gold and Irina Markova  
David and Darlene Grundy  
Bob Hawk  
Emma Hempstead  
Sarah Hooker  
Virginia Humphreys  
Edward Hutchinson and Sasha Thayer  
Mara Iverson  
Richard Jenney  
Kathy Johnson  
Ryan and Kristina Kane  
Kenric Kite  
Susan and Barry Koch  
Fran Krushenick  
Carole MacIntyre  
Jen Matthews and Bill Neuburger  
Mike McCleese  
David and Nancy Mears  
Joanna Meyer  
Johanna Nichols  
Karin Nissen  
Jane Osgatharp  
Eleanor Ott  
Leslie Parr  
Sarah Patterson  
Kris Pavek  
Elizabeth Peebles  
Dave and Ellie Peters  
John and Janet Poeton

Brian and Margot Prendergast  
Norma Raymond  
Marjorie and Richard Rebmann  
Ted Richards  
Jeanne Richardson and Noah Sexton  
Bob Rikken  
Jo Romano and Dan Wetmore  
Donna and Stuart Russo-Savage  
Anne Sarcka  
Ginny Sassaman  
Yona Shahar  
Cecile Sherburn  
Linda Sproul  
Terry Sudol  
Kathy Suskin  
Colin and Debby Tait  
Guy and Debby Tapper  
Julie Tessler and Anthony Zarriello  
Barbara Thompson  
Dan Towle  
JoAnn and Larry Troiano  
John and Yolly Turner  
Linda Vincent  
Pamela Walker  
Peter and Mary Beth Watt  
Martha Winthrop  
Cate and Elizabeth Wirth  
Frank and Betty Woods  
Marj Zunder