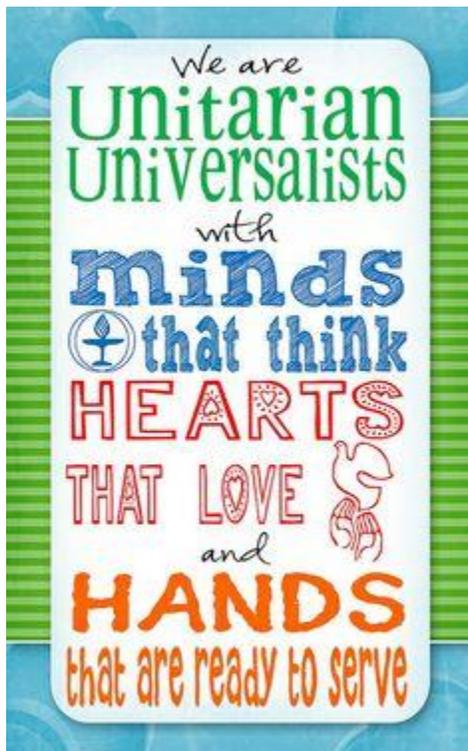




# Annual Report 2016-2017



Valley Unitarian Universalist Congregation  
ANNUAL REPORT  
2016–2017

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**Annual Meeting of VUU**

**June 4, 2017, 12:00PM**

**Agenda**

1. Call to Order: Establish a Quorum (LDC)
2. Invocation – (2 min.)
3. Housekeeping – (3 min.)
  - Approval of Meeting minutes from June 2016
  - Approval of Meeting Agenda and Timetable
4. Elections: Board, Special Funds and LDC (20 min.)
  - a. Any nominations from the floor (2 min.)
  - b. Candidate Introductions (1-3 min. ea)
  - c. Collecting Ballots (2 min.)
5. Minister's Report (5 min.)
6. President's Report (5 min.)
7. Special Funds Report (5 min.)
8. Budget Approval (15 min.)
  - Presentation (5 min.)
  - Questions, Discussion & Vote (10 min.)
9. Election Results (5 min.)

Adjournment (1:00 PM)



**VUU Annual Meeting Minutes  
June 12, 2016**

**Call to order at 12:00PM by Janice Miller**

Quorum was confirmed by the Leadership Development Committee (LDC)

**Invocation**

Rev. Andy gave an invocation.

**Housekeeping – Minutes, Agenda approvals (3 min.)**

Mary R. moved and Lloyd M. seconded to approve minutes of the 2015 Annual Meeting. The motion passed unanimously.

**Elections: Board, Special Funds and LDC (20 min.)**

Janice requested nominations from the floor. There were none. The ballot stands as is. Collection of the ballots completed at 12:05. LDC retreated to count the votes

**Minister's Report (10 min.)**

12:05 – 8mins

The minister's report was presented by Rev Andy Burnette. Rev Andy discussed some of this year's accomplishments including the hanging of the Black Lives Matter banner, discussions with Chandler police and NAACP, as well as Valley Interfaith work. Attendance was 2<sup>nd</sup> highest on record (highest with single service). Membership has grown to 370 up from 341. We have widened our use of technology including streaming a service over the internet. Board completed new vision and ends statements with input from the congregation to help us determine where we go in the future. The staff will now interpret these statements to deliver programs to reach those ends.

**President's Report (10 min.)**

12:13 – 12 mins

Janice M. presented the president's report. Janice presented VUU's new vision and ends statements to the congregation. Membership growth continued this year, the sanctuary is full (80%) in cooler months, expenses are lower, growing endowment fund, budget is largest in history, outstanding ministers, new administrator. Janice asked volunteers to stand and most attendees did and she thanked them for their work.

**Special Funds Report (5 min.)**

12:25 – 6 mins

The Special Funds Report was presented by Chris S. \$7k grant toward the new VUU kitchen. Overall the fund has grown even with the grants this year at \$11.9k for a \$334k current value.

**Budget Presentation & Approval (20 min.)**

12:31 – 9mins

The budget report was presented by DeeAnne M.

- Using April actuals, year-end revenue is projected \$533k with a net loss of ~6k
- DeeAnne also presented a balanced budget for approval
  - A record 10.7% increase in pledges



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- Overall revenue increase of 8.1%
  - Largest budget in VUU history \$591k in revenue and expenses.
  - \$49k in Additions: 14k for interim minister to cover Rev Andy's sabbatical, increase in ministers salaries, created a permanent full-time DLRE, increased budget for paid teachers in RE, utility increases, insurance increase, staff pay increase, denominational dues.
- Ann S. moved and Rita seconded motion to approve the 2016-2017 budget. The motion passed unanimously.

**Election Results (5 min.)**

12:42 – 1min

Elections results were reported by Linda Horton

The proposed slate was elected:

Board: Musette Steger, Jessica Nierad, Paul Schneider

Special Funds: Rick Hinrichs

Leadership Development: Tom Briggs, Linda Horton, Cathy Miller, Debbe Simpkins

**Adjourn (12:43pm)**

Lloyd moved and ? seconded motion to adjourn the meeting. The motion passed unanimously.

Board of Trustees

**President's Report**

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Members and Friends,

This year has been challenging at VUU--we have really had some highs and lows. For the board, our best highlight was the completion of the VUU Vision, following a year-long process that involved dozens of group discussions within the congregation. The result of that work is a guiding document (below) which will inspire and focus the energy of our ministers, staff and volunteers for years to come.

Our greatest challenge this year was the resignation and subsequent reinstatement of our senior minister. At the board level, we were engaged in crisis management—first at the prospect of losing our beloved Reverend Doctor Andy Burnette to the UUA, and then at the work of initiating searches for an interim and permanent minister, and then at the racial controversy emanating from the UUA regarding Andy's appointment. In the end, our strong relationship with Andy made a difference: he committed another 3+ years to VUU. (Joy!) But the trauma of this crisis will require much time to heal for Andy and congregation.

Our other tough challenge this year was financial. Our revenue forecast was too optimistic—partly because of incorrect pledge assumptions and partly because we did not anticipate the adverse impact of Andy's sabbatical absence on giving levels. Fortunately, we implemented several corrective actions mid-year that allowed us to stabilize financial performance and end the year well. We learned from the experience and have made changes that will enable greater financial success in the future. These include changes to stewardship structure, volunteer staffing, data,



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collections and communication—plus improved financial reserves, sabbatical policy, mortgage terms and Special Funds loan provisions.

We are ending the year feeling optimistic about the future, and for very good reasons:

- ✓ We have retained our ministers and key staff members.
- ✓ We are adding many new congregation members, increasing our diversity.
- ✓ Members reported high levels of satisfaction on the annual survey.
- ✓ Our operating budget is balanced for this year and next.
- ✓ We have a significant and growing endowment fund.
- ✓ We have increased community outreach through social justice, denominational and interfaith programs.
- ✓ We have a large number of volunteers devoting their time, and an incredibly talented slate of candidates for committee service.
- ✓ We formed a new group—the EastVUUs to encourage growth and community development in Mesa and Apache Junction.

These strengths will carry us toward our vision, feed our spirits, and benefit the larger community.

On a personal note, I'm completing my third and final year as Board President with a greater sense of respect and love for the congregation, the ministers and the staff. Many of you have personally helped to guide me and the board—thank you! It's been privilege to be in service with these dedicated board members: Paul Schneider (Vice President), DeeAnne McClenahan (Financial Analyst/Treasurer), Jessica Nierad (Secretary), Barbara Face, Cliff Allred, and Musette Steger. They have been collaborative partners and valuable leaders.

As I reflect on the last few years, the greatest satisfaction comes from a sense that we have evolved culturally as a full-fledged program congregation. We have moved to the next stage of governance, one that reflects our great trust in the ministers and staff to manage operations. We are more open to innovation and more impactful as partners for social justice in the larger community. The future seems bright indeed...

Faithfully yours,  
Janice Miller  
President  
VUU Board of Trustees



## Vision

**We are a vibrant, inclusive community, inspired by many spiritualities and theologies, caring for one another through life's challenges, and bending the moral arc of the universe toward justice.**



## **Ends (and Interpretations)**

### **1. We challenge each person to discover, experience, and be transformed by the deep and mysterious.**

We pursue spiritual growth as individuals and as a community. Congregants and other members of the communities we serve engage Unitarian Universalist spirituality throughout the week in a variety of ways including worship services, religious education, music, and service.

### **2. We cultivate our inclusive community through radical hospitality and nurturing.**

We share the good news of Unitarian Universalism in our communities and thoughtfully welcome those who come through our doors, tending the path from visitor to member to deep engagement and leadership. We provide pastoral care for one another across the lifespan. We make it known widely that traditionally marginalized populations are welcome among us, and we develop practices which widen and deepen our welcome. We practice radical hospitality in our communities, standing on the side of love in the face of hate and exclusion.

### **3. We prioritize intergenerational experience through increased investment in the faith formation of the next generation.**

Our children and youth pursue spiritual growth. They discover, experience, and are transformed by the deep and mysterious. Prepared for leadership by their experience at VUU, our children and youth counteract hate and live out values of love and inclusion. We joyously create spaces in which multiple generations can worship, learn, and serve together. We realize that this demands resources, financial and other, and we work to develop those resources.

### **4. We engage in partnerships to counter systems of oppression and create a just, sustainable, and healthy world.**

Realizing it is not possible to effect justice alone, we work with partners. Our partners include congregations and other organizations from many faith traditions, and organizations or individuals from traditionally marginalized communities.

### **5. We are an innovative congregation, growing Unitarian Universalism in covenant with our UUA partners.**

We are excited to explore new ways to welcome more and more people into our faith. We foster a culture of experimentation and thoughtful risk-taking. We are committed to being in covenant with other Unitarian Universalist congregations by continuing to pay our fair share to our district and the association, and by working with them to implement programs and strategies which further our faith.

11/29/16



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**Senior Minister's Annual Report**  
**Valley Unitarian Universalist Congregation**  
**June 2017**

Dear VUU Members and Friends:

What a tumultuous congregational year this was. From July 1 through October 31, I was on sabbatical. In March, I resigned from VUU and announced that I would be accepting the role of Southern Region Lead with a start date of August 1. Of course, that didn't end up happening. As the result of a UUA trustee who also applied for the position taking to social media to air a grievance that she, a woman of color, was not hired, and after the resultant resignations of the UUA President, Chief Operating Officer, and Director of Congregational Life, I withdrew my acceptance of the lead role and promised to serve at VUU for at least three more years as a condition of your allowing me to rescind my resignation.

I am deeply grateful for the love and support offered me and my family by the members of VUU. You have been so gracious in welcoming me back as your minister and reaching out to my family. It makes me feel all the worse for causing the congregation such upset, but all I can do to say thank you is to give my best ministry moving forward, and that's just what I plan to do.

Still, it would be dishonest to pretend this incident had no effect on me and my family. In fact, it has challenged my faith. The stress caused some members of my family physical symptoms. I am feeling my way to a new relationship with the Unitarian Universalist Association, one which for the first time in my career involves no regional or national leadership roles. I am completely focused on my ministry to VUU and to the city I have come to love.

Personally, the incident has led me into a season of reflection. I am reading works by my favorite spiritual author, Parker Palmer, and am getting back in touch with the beating heart of my call to ministry. The UUA has provided funding for personal coaching, and for that I am grateful. I will come out of this incident stronger, knowing better what I want to accomplish in the second half of my ministry. But it will take a while. Of course, our shared work of love, service, and justice goes on in the meantime.

## **LAST YEAR'S ACCOMPLISHMENTS**

In the midst of all the turmoil in 2016-17, we accomplished some important things together:

- 1) We developed and began to center our new ends statements. Congratulations to the entire congregation on this participative effort!
- 2) DeeAnne McClenahan and the revamped stewardship team, now under the supervision of the Board of Trustees, is doing a great job recasting our pledge drive. I am deeply grateful for their faithfulness.



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- 3) Speaking of recasting, we recast the mortgage, leaving us a little more cash available each month for other ministry-related expenses. Thanks to the VUU Board of Trustees for its diligent work on this!
- 4) We became members of Valley Interfaith Project, a group which organizes in congregations to build power and influence legislators to act on our values. VIP is an Industrial Areas Foundation group, founded on the Congregation-based Community Organizing philosophy of Saul Alinsky. Here, borrowed from an online article detailing the philosophy, are a few characteristics of VIP and groups like it:
  - 1) **Faith-based:** They ground their organizing in the moral values and traditions that stem from religious faith, to varying degrees and often quite powerfully.
  - 2) **Broad-based:** They are typically ecumenical or interfaith, and many include schools, unions, or a variety of other community-based institutions like neighborhood associations.
  - 3) **Locally constituted:** They organize in areas that range from large neighborhoods to entire cities. Although linked into national and regional networks, they emphasize local grassroots organizing.
  - 4) **Multi-issue:** Their purpose is to instruct local congregational authorities about how to effectively address a variety of pressing issues facing their communities.
  - 5) **Professionally staffed:** CBCO groups hire professionals to recruit and train leaders to work with their religious communities on a personal and regular basis.

VIP membership requires dues of about 1 percent of a congregation's budget. This money is used to fund salaries and other costs. Special Funds approved \$4,000 toward VUU's membership for 2017-18, and next year we will be looking at working that cost into our annual budget. Currently, we have formed a core VIP team of about 10 VUU members which will be holding individual and house meetings to discern the most important issues to our congregants. They are receiving training from VIP's lead organizer on holding these meetings.

The team will then educate itself on the issues and host Civic Academies, opportunities for our members and friends and others in the community to learn about the issues dear to us. Afterward, we will make appointments with our legislators and speak with them from an educated perspective. The possibilities are exciting!

Our work with VIP will not preclude VUU's other social justice projects. It will, however do two very important things. First, it will give us a way to discern what is closest to our hearts when it comes to social justice, and to do something about those issues. And second, it will get us to the table with other organizations, including faith groups, labor unions, and schools, to build power and work for good in our communities.



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## LOOKING AHEAD

Ministry, like life in general, hardly ever goes as planned. However, if it were to go exactly as planned, here's what I would hope to be reporting on next year:

- 1) Completion of a loose two- or three-year plan for implementation of our ends statements, including measures for success developed by the board and me.
- 2) Finally expanding our capacity by adding a second (October through April) worship service in 2018-19, with RE for all ages between the services.
- 3) Greater participation in our revamped Chalice Circles program.
- 4) More members learning about social justice issues and meeting with their legislators in conjunction with our community partners.

I am deeply grateful to you, and for our partnership in ministry. I am sorry for all the chaos in the year just past. Thank you again for your ministry to me and my family as we faced a difficult time. It is a great honor to be your minister, and I am thrilled to be back to the work with you!

With love,  
Rev. Andy

## MUSIC MINISTRY & MEMBERSHIP -ANNUAL REPORT 2016-17 Submitted by Rev. Kellie Walker Hart

**MUSIC MINISTRY/WORSHIP:** A main focus this year has been to incorporate some of the ideas I learned last spring and summer from working with Marcia McFee, author of *Think Like a Filmmaker: Sensory-Rich Worship Design for unforgettable messages*. And I spent May 8-12 this year at a Worship Design Retreat with her at Lake Tahoe, along with Barbara Metz from the Worship Associates Team. Barbara has started a Visual Arts Team which will be working closely with Worship Associates to integrate more visual, special, and media arts into our Sunday morning worship services.

**CHOIRS:** The Adult, Children's, and Bell Choirs have all welcomed new members this year. The Bell Choir gave their first full-length concert in April, and continues to get better and better under the capable leadership of volunteer director Joan Bundy. The Adult Choir (with many thanks to Ken St. John as "Producer") had great fun singing at and helping with the annual fall Cabaret last September, with the theme this time of "Election Selections." Members of the Adult and Children's Choirs also sang in the annual Tempe Interfaith Fellowship Thanksgiving Service in November.

**OUTREACH:** The Voices Lifted Singers continued its partnership with Hospice of the Valley, singing regularly at two of their inpatient units each month, as well as at Desert Haven Care Center in Phoenix. They also sang for several congregants and friends of VUU in their homes or assisted care facilities.



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**DENOMINATIONAL:** I continue in my role as a Good Officer through the UU Musicians Network, and was selected to be chair of the Worship Design Team for five services at the upcoming UUMN summer conference in Arlington, Virginia. I traveled there in February for a meeting with the Conference Planning Committee. I finished and submitted my portfolio to become a Credentialed Music Leader through the UUA in February and expect to “walk” and be recognized at the Service of the Living Tradition at General Assembly in New Orleans in late June.

I was the musician-in-residence at the Fall Conference of the Liberal Religious Education Directors Association in San Diego in October. I also worked with the UU congregation in Port Townsend, Washington on a vision process for Music Ministry and preached while there on Music as Ministry. I attended the Pacific SW District Annual Meeting in Amado in early April, studying border issues.

**THANK YOU TO MICHAEL:** Michael Lewis has been the Sunday morning pianist this past year, but is starting a job at the Arizona Opera Company next fall. We said goodbye to him on May 14 and Jill Khaleghi, who has been the Wednesday night choir pianist, will play piano on choir Sundays starting next fall. We will be hiring guest pianists to fill in for the summer and plan to hire another pianist to share with Jill and play on non-choir Sundays this fall.

**MEMBERSHIP:** The October Journey to Membership Session was cancelled this past fall, as newcomers seemed to prefer to wait to join until Rev. Andy returned from his sabbatical in November. Sessions were scheduled in January and April, however, and a total of 31 new members joined in those months. An additional session is scheduled for Sunday, August 20, as some interested people were unable to attend these prior sessions. Rebecca Riggs and Sherrill Smith have been hosting Dessert/Discussion events for new members about a month after they officially join, which they seemed to enjoy and helps them get to know each other better.

The Young Adult group has occasionally organized off-site social events in the past church year and goes out to lunch together after services on most Second Sundays.

## RELIGIOUS EDUCATION 2016-17 ANNUAL REPORT

### CLASSROOMS

Our theme this year, for youth in 2<sup>nd</sup> – 12<sup>th</sup> grades is Our Judeo-Christian heritage. Younger children use Unitarian Universalist based curricula that teach to our 7 principles drawing wisdom from our 6 (7 if you add Unitarian Universalist wisdom) sources.

As of the middle of May, we have had 2138 children and youth signed into a Sunday morning class. 84 families completed registration forms for their children/youth, a total of 158 registered children/youth, a 33% increase in registration. An additional 62 children and youth attended as guests. We averaged 47 children and youth per Sunday in our classes.



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Our experiment this year with hiring lead teachers was very successful. The goal of lead teachers: consistency in the classroom, increased teacher preparation, and familiarity with the regular attendees and the goals of the curriculum, were reached and surpassed. The regularity of a lead teacher allowed the children and youth to feel connected with their classroom and afforded the teachers the freedom to reflect on past lessons and extrapolate when “teachable moments” occurred. All 4 teachers came from within the congregation – a fact I was not expecting.



A HUGE Thank You to our exceptional lead teachers!! Preschool: Nhu-Mai Simon-Kimble, Kinder/1<sup>st</sup> grade: Teri McGovern-Nintzel, 2<sup>nd</sup>/3<sup>rd</sup> grades: Sharon Hagen, and high school: Rebecca O'Rourke. All 4 have agreed to lead classes again next year. Rebecca will be staying with the high schoolers but the other 3 will be moving up a grade level.

### **PROFESSIONAL GROWTH**

I attended one Renaissance Module training – Curriculum Planning, and the LREDA Fall Conference in San Diego. I have continued in my denominational roles as President of the local chapter of LREDA and as a Good Officer for LREDA professionals. Good Officers offer support during times of professional conflict.

### **YRUU**

YRUU continues to be a strong youth group. Lead high school RE teacher, Rebecca O'Rourke, helped the youth plan, design, and implement a facelift in the Memorial Garden. The youth continue to enjoy the monthly youth mUUVie night.

### **MUUGS**

The Middle school Unitarian Universalist Group (MUUGs) struggled this year. The 2 or 3 families that have, in the past, planned monthly gatherings and after worship game days, have been less involved this year. A few new families have expressed interest in getting the social group re-invigorated in the fall.

Likewise, the “AzMUUGs” social group for youth from UU congregations around Arizona have ran into challenges this year. Two statewide gatherings were planned one was cancelled and the other poorly attended, mostly due to struggles and DRE turn over within the congregations hosting the events. Together with the DRE at Mt. Vista UU, Tucson, I am committed to offering our middle school-aged youth the opportunity to get to know other UU youth in the state.



### **OUR WHOLE LIVES**

In the fall, we offered Our Whole Lives (OWL) Human Sexuality class for children in 5<sup>th</sup> & 6<sup>th</sup> grades. Because of the large number of participants, 20, we created 2 classes, run simultaneously on Sunday afternoons. The group consisted of 2 sets of twins, 5 children from VUU families who no longer attend, and 6 friends from outside of the congregation – 2 of whom have continued to attend Sunday morning RE classes.



To support the parents' role as primary sexuality educators for their children, we offered a companion class for the parents. In the companion class, the parents are given the opportunity to bring up questions, discuss the lessons, and to support one another.

In the spring, we were given the opportunity to "beta test" a new OWL program for "older" adults. The program was written for adults aged 50 and up. We were required to have at least 8 participants – we had 14. Participants and facilitators were asked to evaluate the program.

### **ARE - ADULT RELIGIOUS EDUCATION PROGRAMS**

We continue to offer a wide variety of lay led adult RE programs, including several that have continued from last year; Spirit of Life Reading Circle, Dalai Lama and Friends workshops, Great Books, Not So Great Books, and a strong Couples Ministry.

A new program, Free Ideas (mind and matter) grew out of the Spirituality & Quantum Leap group.

Jeff Drake, a member of the Unitarian Universalist church of Surprise, offered a parenting class; *Understanding your child's hard-wired character type, and how to best work with it*. A small group of parents and "those who help raise children" attended.

### **COMING OF AGE**

Coming of Age uses principles of Unitarian Universalism to highlight the transition from childhood to the teenage years and emerging adulthood. The program takes advantage of the diversity of Unitarian Universalist ideas and principles to give a foundation for a lifelong search for truth and meaning, and a commitment to service, justice, peace and environmental stewardship. The program includes team building activities, introduction to spiritual practices, creation of prayer beads and altar boxes. We touch on UU history as well as Valley UU history. The youth planned and facilitated a Sunday morning worship service, during which they each presented their credo statement.



Families successfully fundraised over \$15,000 to pay for the program culminating "heritage trip" to Boston, Mass. The 11 participants and 3 facilitators (Rebecca O'Rourke, Carl Anderson, and myself) will explore Unitarian and Universalist (and US!) history for 5 days in June.

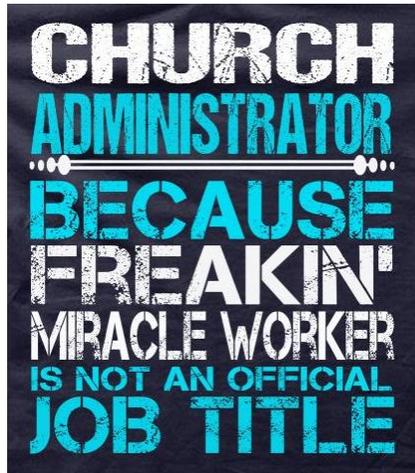
*-Submitted by*

*Marcí Beaudoin*

*Director of Lifespan Religious Education*



**Congregation Administrator 2016-17  
Annual Report**



Last year when I wrote this report, I had been your Administrator for less than a year. This time I've been here almost 2 years. What a difference a year makes! Feeling a lot more competent than last year. For those who know me or have talked with me about my job, you know that this Admin-stuff does not come to me naturally...in real life, I kinda don't care about money or budgets or reports, etc. So, this opportunity has allowed me to stretch my giftedness to include these items now. Just call me your local renaissance woman – maybe not...I just know a little bit about A LOT of stuff!

My job here at VUU is to manage the day-to-day operations of the office, streamline processes where possible (incorporating technology and best practices), improve communications and help coordinate volunteer activities. I'm also the staff liaison to both the Facilities Team and the Finance Team.

**Day-to-Day Office Operations:** When Andy went on his sabbatical July – October 2016 we successfully held down the fort with the help of sabbatical minister Rev. Earl Holt. I've been able to bother Byon Garrabrant, VUU Volunteer/IT coordinator, less this year. His tutoring me on the updating of the website must have worked. This year VUU accounting and payroll continues to be out-sourced to JDP Accountants. Brenda Patton is our liaison and takes care of our accounts. Brenda continues to be a wonderful resource to us! Our monthly, preset SRP charges have been reduced for the coming year in part due to LED lights that now light up our parking lot. We continue to have a great relationship with those who rent our space – Adobe Montessori, NefeshSoul, Counselor Jane Baker and our new renters this year, Taoist Tai Chi Society and Desert Lotus Zen.

**Communications:** Along with the website mentioned above, we continue to use a one-page Order of Worship that is available on a link on the front page of the website: just click on *OOW* and there it is. The link is published every week in the Thursday email blast called VUU Happenings, our weekly email reminder (thanks Sharon Kopina!). Along with the monthly newsletter, VUUPoint (many thanks to long-time, awesome editor Gilda Czerwonka) we now publish a Sunday Bulletin that includes a calendar for the coming week and other important info for both seasoned VUU attendees and newbies! I'm also more involved with our Social Media (Facebook) presence now. Our new software system, Breeze has allowed us to keep better track of your giving record, your pledge, your contact info and what skills, interests and experiences you want to share with this community. Breeze even made it possible to create an electronic Directory that is easy to update and email as an attachment to VUU Members and Friends. We will be updating this Directory soon so send us a picture for the directory. Just email a jpg to me at [office@vuu.org](mailto:office@vuu.org) (Thanks Jim Nielsen for your help with everything Breeze!) Thanks to another volunteer, Amy Monahan, we boast a new *Welcome Brochure* for visitors, a wonderful new document for our [new member classes](#) and the VUU



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business cards that you can pick up anytime you are here (on the Welcoming Table) and share with your family and friends when you are boasting about your awesome community – Valley UU! We welcomed Linda Horton as our Volunteer Coordinator this year. Linda, herself a volunteer in this position, has helped us recruit Sunday Morning Hosts who are the 'go-to' people for any questions/needs at the Sunday Morning Service.

**Facilities:** Joe Martin continues as our Maintenance Tech and he treats this facility as if it were his home. He cares about our facilities and works very hard. We have a good working relationships with the companies that maintain our landscape, take care of our AC needs, keep our bugs in check. These companies care about our facility and work hard to make it our home away from home.

Submitted by Sue Ringler, Administrator

**Leadership Development Committee Annual Report for 2016-17  
submitted by Tom Briggs**

The LDC policy lists the following purposes and responsibilities:

- provide leadership education to VUU members
- gather information and recommend potential candidates for leadership positions
- recommend qualified candidates to fill vacant positions in elected office
- prepare an annual slate of candidates for elected positions
- conduct the election at the annual congregational meeting
- facilitate mentoring of leaders

To fulfill these responsibilities, we conducted two workshops, one for current leaders entitled "Nuts and Bolts of Being a Leader at VUU" on September 24, 2016 and one for the entire VUU community entitled "From Vision to Reality" on January 14, 2017. More than 50 members of the VUU community attended these workshops. Both workshops consisted of a keynote talk by Reverend Dr. Andy Burnette, presentations by members of the LDC and lots of discussion and feedback from attendees.

The LDC plans to use the feedback from workshop attendees to help us design future workshops to be held in 2017-18. Our goal is to help everyone at VUU to take their "Vision to Reality" within the framework of the VUU Mission, Vision & Ends. If you have any thoughts or comments on how to best accomplish this goal please share them with us at [leadershipdevelopment@vuu.org](mailto:leadershipdevelopment@vuu.org).

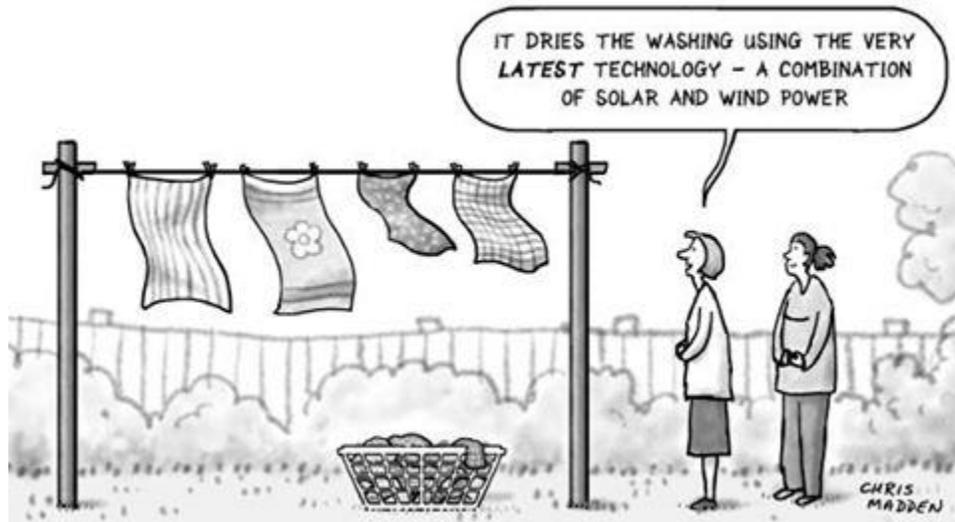
We have recruited an excellent group of qualified, diverse candidates for the three elected leadership committees: Leadership Development, Special Funds, and the VUU Board of Trustees. We have prepared a list of eligible voting members for the election at the Annual Meeting and are prepared to count the votes at that meeting.

Throughout this process, we have identified a need for a smooth "orchestration" of the leadership development process. We plan to work closely with the Minister, staff, committee chairs and all members of the VUU community in the coming year to achieve this.

Committee: Tom Briggs, chair, David Sheh, secretary, Linda Horton, Cathy Miller, Debbe Simpkins, JoAnne Smith, Barbara Sorauf



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**Social Action Ministry Annual Report 2016-17 submitted by Willa Cree**

The congregation has been very supportive of our many social action activities this past year. We continue to provide help to Paz de Cristo by serving dinner every 2<sup>nd</sup> Friday of the month, collecting food, and (new this year), providing debit cards. In addition, working with I-HELP we serve food and provide sleeping accommodations for approximately 25 homeless almost every Monday of the month. Our Green Sanctuary Garden has been extremely successful this year, and we continue to donate Garden produce to Tempe Community Action Agency.

Education for our congregation has been important this year. Two book studies, "Just Mercy" and "For White Folks that Teach in the Hood...and the Rest of You Too" were both well attended. Black Lives Matter began a lending library with both books and film available. The film "13<sup>th</sup>" about the evolution of mass incarceration was shown and a civic academy on prison reform brought attention to the critical problems surrounding incarceration in Arizona and the U.S. In partnership with Religious Education, we showed the film "Defying the Nazis: The Sharps' War". Workshops on "White Privilege" and "De-escalation Training" were given.

Members of our congregation were often at the state capitol making their voices heard, or participating in marches, such as the "Gay Pride" and "Peoples' Climate Change" marches. We also participated with UUJAZ for *UU Day at the Legislature*. Anne Schneider continues to put out the "Legislative Alert" to keep us updated on what our legislature is doing, and giving us a "50-Week Action Plan", which gives us one or two ideas of something we can all do each week to support progressive social action concerns. More congregation members are becoming active in social action activities and we are also working with interfaith groups around the valley to broaden our reach and understanding of the many social action concerns that are facing us today.



**VUU Facilities Team Annual Report 2016-17 submitted by Debbie Dinyes**

We have had a relatively quiet year, which we always welcome. Aside from basic maintenance we have had a few new activities.

We now have a Little Free Library near the office. |This is a scout project for Megan Sar and we appreciate being part of her overall project to put up three of these libraries. Little Free Libraries are places to borrow and trade books, operating on an honor system. Come by and check it out. Many thanks to Megan and her family for their work on this

The Memorial Garden has gotten a face-lift, thanks to the high school RE class and their teacher, Rebecca O'Rourke. They cleaned up the area and planted a variety of desert plants. Cushions were placed on the two chairs. They oversaw making a colorful handprint mural on the interior fence. Thank you all for your work on this.

The Memorial Garden is located behind the office building. You can reach it by going through the breezeway in the RE courtyard. The main purpose is for direct placement, by members, of ashes of loved ones. It is also a nice place to sit quietly. The guidelines and forms are currently being reviewed and revised to update some details.

The Black Lives Matter banner has been put on the east wall of the sanctuary. So far it has been free from vandalism due to height, thick bushes and lighting. A Welcome Immigrants and Refugees banner is up there as well.

Thank you to Sue Ringler and Joe Martin for their work on the everyday things that keep the lights on and the doors open. Thanks to Jim Horton and Jerry Waters for working on all types of projects, both research and hands on tasks.



**Stewardship Report 2016-17 Submitted by DeeAnne McClenahan, Treasurer**

The 2017 operating pledge campaign was conducted primarily by email and online pledging, with follow up meetings, a Stewardship table on Sundays, and requests through April. The 2016 pledge campaign was a low-key request, with most pledges being estimated based on prior year pledges and giving.

Twenty-five (25) new households pledged in 2017, with an average pledge of \$1,444. Twenty (20) 2016 pledging households were deceased or moved (7), resigned membership (5) or declined to pledge (8) for 2017. Of these, 5 have continued contribution at some level in 2017. Data by quadrants is below.



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2016	Pledge Count	Total Pledges	Pledge Avg.	% of Total
1	133	\$101,236	\$761	25.0%
2	42	\$100,353	\$2,389	24.8%
3	24	\$102,746	\$4,281	25.4%
4	12	\$100,632	\$8,386	24.8%
<b>Total</b>	<b>211</b>	<b>\$404,967</b>	<b>\$1,919</b>	<b>100.0%</b>

\*2016 includes primarily estimated pledges

Actual collected: \$390,178 (96.3%)

Pledgers giving \$0 = 25, Pledgers giving more than pledge = 72

Members = 182, Friends = 14, (now) Inactive = 15

2017	Pledge Count	Total Pledges	Pledge Avg.	% of Total
1	133	\$ 102,658	\$ 772	24.8%
2	40	\$ 105,616	\$ 2,640	25.6%
3	22	\$ 104,772	\$ 4,762	25.4%
4	11	\$ 100,108	\$ 9,101	24.2%
<b>Total</b>	<b>206</b>	<b>\$ 413,154</b>	<b>\$ 2,006</b>	<b>100.0%</b>

\*2017 includes 22 estimated pledges

Estimates are based on actual 2016/17 giving

Members = 189, Friends = 17

With the congregation's Breeze software, accounting for contributions, pledges, and providing statements to Members and Friends has been dramatically easier. Pledge and contribution data is available online to the Treasurer and Pledge Drive chair, and is securely administered via roles assigned. Membership data is available to church staff and the Membership committee, and includes member profiles, contact information, photos, addresses and volunteer expertise.

Special thanks to Church Administrator, Sue Ringler for administering pledges and contributions, Member Jim Nielson for huge help in setting up and maintaining the software, Member Byon Garrabrant for setting up online giving and pledging through our website, and Stewardship Chair, Carl Anderson for conducting 2016 and 2017 pledge drives.

**Caring & Concerns Committee Annual Report 2016–17  
submitted by Lauree Perry**

The Caring & Concerns Committee operates under a Neighborhood Contact format. Contacts help identify VUU Members and Friends who need short-term support and assistance; and work with the Minister, Staff, and other Members of the Congregation to meet those needs. We also recognize the joys and milestones in Members lives.



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This past year some of the services the Caring & Concerns Committee provided included: helping with meals, transportation, calls, visits etc. when needed; sending cards and notes for joys and sorrows; referring the Voices Lifted singing group to ill and homebound members, and recognizing 10+ year Members in the Newsletter. Requests for help or to have an event mentioned during the Pastoral Prayer can be sent to the Caring & Concerns email at caring @vuu.org. There are 3 Caring Quilts able to be lent to members of the congregation when ill or recovering from surgery. We also work with the Minister and the Lay Pastoral Care Providers to identify additional ways to meet the needs of all Members

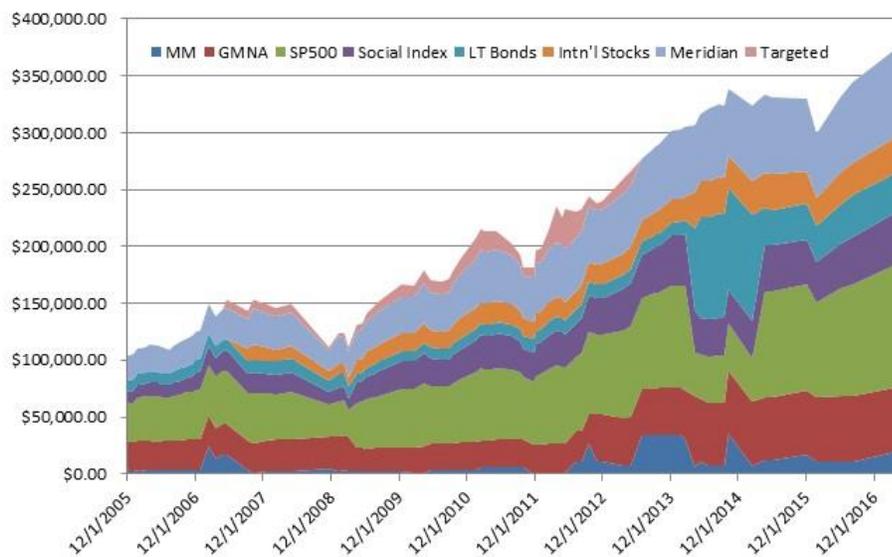
We always welcome new Contacts in all areas to be able to provide full coverage to all our members.

**Special Funds Annual Report 2016-17 submitted by Chris Sar**

# Special Funds Report 2016-2017

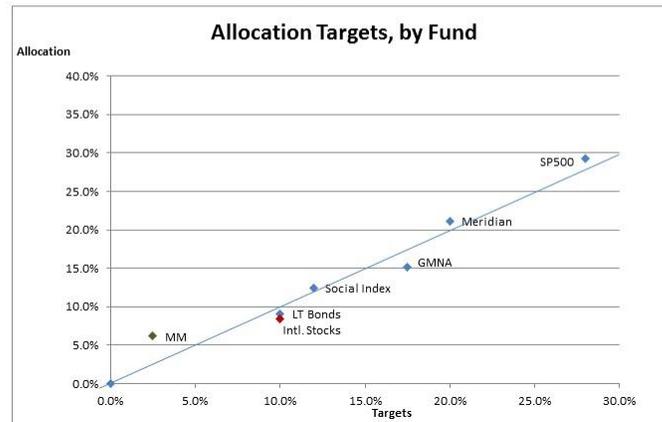
The endowment continues to grow, following our carefully diversified investment strategy and a bull market. However long-term growth will depend upon member contributions through estates and gift plans.

**Fund Portions By Fund**



## Special Funds Report 2016-2017

Committee maintains a diversified allocation strategy, and regularly rebalances against target percentages. Currently we are watching the performance of the international fund, while all others are within target ranges.



## Special Funds Report 2016-2017

- Year-to-date grants: **\$4,000.00** to begin supporting the Valley Interfaith Project through annual membership dues;
- Year-to-date earnings: **\$13,928.06**;
- Started scheduling bi-monthly estate and financial planning workshops;
- Reviewing the Special Funds charter to simplify grants and make fund availability more predictable for the congregation;
- Need to do more planning to celebrate and recognize members who commit gifts to VUU endowment in their wills or estates.

The Special Funds Committee solicits donations to the Congregations' endowment and manages those investments for the long-term benefit of the Congregation. In addition, Special Funds handles all donations of stock or other securities to VUU. The endowment represents the principal vehicle for our Congregation to ensure its financial stability and guarantee the mission of the Congregation will continue for another 50+ years. Members: Chris Sar, Chair, Mindy Ramsey, Treasurer, Joel Sannes, Secretary, Carl Anderson, Jay Miller



### **Chalice Circles Annual Report 2016-17 submitted by Molly McNamara**

Chalice Circles, VUU's Small Group Ministry program, is an intentionally formatted series of twice monthly meetings which offer participants spiritual growth, deep connections and opportunities for service. These groups of 6 to 12 people, led by a trained facilitator, reflect on a variety of spiritual topics and life issues. Chalice Circles encourage listening more than speech making and sharing personal stories more than debate.

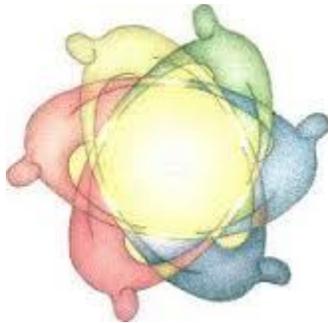
The VUU Chalice Circle program began in January 2013, with an abbreviated series of six Circles which met through May 2013. The first full cycle of Chalice Circles ran from August 2013 until May 2014.

The most recent series of Chalice Circles completed a 2016-2017 cycle in April 2017. The year began with two Circles, but due to a decline in participation, the Circles were consolidated prior to the new year. The remaining Circle presented two service projects: one within the Congregation and one to the larger community. The Circle was very close-knit, and excited to stay in touch even after the Circle came to a close. The participant evaluations reflect their positive experience.

The Chalice Circle Steering committee: Dianne Haskell, Lenore Braun, and Molly McNamara, led a 3-hour training at the beginning of October for both Circle Facilitators, Johnnie Godfrey and Beverly Workmon.

Throughout the year, the Chalice Circle Steering Committee, and the Circle Facilitator(s) met monthly for a circle with Reverend Andy.

The last two months of the Chalice Circle Facilitator Meetings, the group had discussions about plans for the next steps. The small number of participants has led to new strategies for next year, including sign-ups based on locations/day and marketing through video. The Steering Committee, with Beverly Workmon's equal input, would like to see the Circles continue with a bit of "rebranding." All agree the ministry and connections build within Chalice Circles are valuable to VUU.



**Women's Group Annual Report 2016-17**

**submitted by Margaret Stewart, Johnnie Godfrey and Sally Buntschuh**

After a hiatus of a few months, the women of the VUU Women's Group met in January and decided to try a new meeting schedule. Beginning in February 2017, the VUU Women have met on the fourth Sunday of each month, soon after the worship service. Two or three women volunteer to provide lunch, and those who participate enjoy becoming better acquainted, and sharing a topical conversation of the day. The Women's Group welcomes all women of Valley UU Congregation. Watch the VUU Newsletter and Sunday bulletins for upcoming meetings!

**Men's Groups Annual Report 2016-17 submitted by Frank Mundo**

In March of 2016 the first Men's Group was started at VUU. The 8 initial members continue to meet for two hours every two weeks. The group provides an opportunity for members to discuss topics of interest to men and to share past experiences as well as what is going on in their lives. Most members are members of VUU.

Several men expressed interest in joining the group. To accommodate these men a second men's group was started in March 2017. The second group which has eight members also is more age diverse than the initial group with ages ranging from 28 to 78 some 50 years.

I have belonged to a men's group in Maine for the past 12 years and have always assumed it was wise to maintain some homogeneity in age as important (interests, perspectives etc.), but it appears based on the success of the second group I was wrong.

Our members are both long term VUU members and men new to the church.

**New This Year at VUU: The EastVUUs!**  
**submitted by Margaret Stewart & Janice Miller**

In January of 2017, Kellie Walker Hart invited VUU members who live in the East Valley --Mesa and Apache Junction-- to gather on four successive Sunday evenings to talk about their common interests. More than twenty people participated, and everyone enjoyed the opportunity to get acquainted and to talk about the possibility of organizing and meeting on a regular basis. Different members offered to host the gatherings, potluck suppers and conversation about the group's organizational dreams and possibilities.

The group agreed to meet monthly for fellowship, spiritual development and involvement in social justice. The name EastVUUs (East "Views") was suggested and was happily acclaimed. The second Thursday of the month was chosen as a regular meeting time; hosts and venues will be posted in the VUU Happenings and Sunday bulletins! All VUU members, friends and neighbors who live in the East Valley are invited and welcome to join the EastVUUs.



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**Finance Committee Annual Report 2016–17 submitted by David Sheh**

The primary role of the Finance committee is to:

1. Monitor VUU finances, discuss and analyze pertinent financial matters and to perform a thorough review of the congregation's finances for the prior month and year-to-date.
2. Recommend a budget for the next Fiscal year to the Board of Trustees
3. Update financial policies and recommend to the Board of Trustees.

To achieve these goals, we met and reported to the Board monthly. While most Finance deliberations are done out of sight of the congregation, the committee's role is critical to the continuing success of VUU. The accuracy of the congregation's actual results to budget reflect the dedication of the members of the Finance team, the thorough application of sound budgeting principles and practices, and the consistency of our congregation's historical fundraising, spending, and giving habits.

The Finance Committee was chaired in 2016-17 by David Sheh. Committee members included DeeAnne McClenahan (Financial Analyst), Joan Bundy (Recording Secretary), Cliff Allred (Board representative), Byon Garrabrant, Linda Horton, Richard Bitner, Garry Klepser, Rev. Sue Ringler, Church Administrator (ex officio), Rev. Dr. Andy Burnette (ex officio). Brenda Patton of JDP Accounting is our part time bookkeeper.

Special thanks go to DeeAnne McClenahan for all of her dedicated work in maintaining detailed spreadsheet records, allowing this committee to have a clear and detailed analysis of monthly and year-to-date financial results.

In addition, special thanks go to Anne Schneider, the compiler for the 2017-18 budget. Thank you, Anne, for your dedication and diligence to ensure that we have a balanced budget to recommend.

An Audit subcommittee was created under the auspices of Finance consisting of DeeAnne McClenahan, Chairperson, David Sheh, Anne Schneider, Joan Bundy, Byon Garrabrant and Sue Ringler with participation by our bookkeeper, Brenda Patton. Records were sampled and processes examined. The subcommittee met in August to discuss findings and observations. There were 17 of these, all of which have



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been discussed on tracked in subsequent Finance meetings throughout the year. As of the May meeting 2 items remain open.

In September-October VUU faced a serious cash shortfall due to years of small ( $\leq 1\%$ ) deficits, a downturn of pledge income during the summer and 2 minister's salaries during the sabbatical. An ask for back pledges to the congregation dealt with the immediate problem. For a medium-term fix, Finance and Special Funds arranged for a 2 year \$30K Line of Credit from the Endowment. The long-term solution is for VUU to increase its operating reserves over 3 years. Look for the \$10K line item for operating reserves in this year's budget.

A Budget Subcommittee was formed again this year, under the auspices of Finance, and chaired by David Sheh and included DeeAnne McClenahan (FA), Anne Schneider (Budget Compiler), Carl Anderson (Stewardship representative), Rich Bitner, Mike Anderson, JoAnne McGrath and Sue Ringler (staff representative). Rev. Dr. Andy provided the detailed ministry expenses. The committee met 3 times during January-March to review budget submissions and to develop several budget scenarios to present to the Board of Trustees for FY 2017-18.

The final Board of Trustee's approved budget for next year will be presented for Congregational discussion and approval during today's annual meeting.

Finance also reviewed Financial policies this year. We recommended updates to the the VUU accounts policy and Board polices, which the Board approved.

Shown at the end of this report is a summary of the May Tracking Report covering the period July 1, 2016 through April 30, 2017, reflecting year-to-date actuals with comparable budget amounts and with a current projection of year end result. This report has been recommended to the Board of Trustees for their approval.

For this fiscal year-to-date (through April), the congregation's revenue is \$463,500 (78.4% of the budgeted \$591,000). Expenses to date are \$468,300 (79.2% of the budgeted \$591,000). It is anticipated that many members will catchup on their outstanding pledge obligations during May and June.

**While a balanced budget was approved by the congregation for this fiscal year, it is the Finance Team's most current projection that VUU will end the year with a projected deficit of about \$5K +/- \$5K.**

Thanks, and a job well done, goes out to Cliff Allred, Byon Garrabrant and Joan Bundy who will be leaving Finance at the end of this fiscal year - June 30, 2017.

The committee has nominated to the Board Anne Schneider, David Sheh and Linda Horton for Finance Committee terms 2017-19. Next year's Board will choose a Financial Analyst for 2017-19 and a Board Representative for the next congregational year.



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	<b>Jul '16 - Apr 17</b>	<b>Bud Apr-Jun</b>	<b>Projection</b>	<b>FY Budget</b>
<b>Ordinary Income/Expense</b>				
<b>Income</b>				
<b>400.00 · Contributions</b>				
Compassion in Action	8,131.72	1,656	9,788	9,938.00
Contributions - Named	18,976.82	5,433	22,410	32,596.00
<b>Total Contributions - Unnamed</b>	<b>17,155.80</b>	<b>3,333</b>	<b>20,489</b>	<b>20,000.00</b>
One Time Journey + Grant	4,225.00	1,888	4,225	11,328.00
Pledges Operating	332,998.98	70,478	398,477	407,993.00
<b>Total 400.00 · Contributions</b>	<b>381,488.32</b>	<b>82,789</b>	<b>455,389</b>	<b>481,855.00</b>
<b>440.00 · Rental Income</b>				
		0		
Adobe School	48,887.75	9,781	58,669	58,688.51
Adobe School 3rd office	2,700.00	428	3,128	2,570.24
Adobe Utilities	10,010.00	2,002	12,012	12,012.00
Counselor	2,100.00	422	2,522	2,530.00
Nefesh Soul	5,000.00	1,000	6,000	6,000.00
Occasional	1,345.00	678	1,773	4,065.00
<b>Total 440.00 · Rental Income</b>	<b>70,042.75</b>	<b>14,311</b>	<b>84,104</b>	<b>85,865.75</b>
<b>450.00 · Income - EVENTS</b>				
		0		
Cabaret	539.03	167	539	1,000.00
Goodwill rummage sale		0	1,000	
FUUNd Together	9,205.00	0	17,000	17,000.00
<b>Total 450.00 · Income - EVENTS</b>	<b>9,744.03</b>	<b>167</b>	<b>18,539</b>	<b>18,000.00</b>
<b>455.00 · Income - Investments</b>				
		0		
Interest from Savings Account	4.84	0.00	4.00	0.00
<b>Total 455.00 · Income - Investments</b>	<b>4.84</b>	<b>0</b>	<b>5</b>	<b>0.00</b>
<b>460.00 · Income - Miscellaneous</b>				
		0		
Altar Flowers	320.00	80	400	480.00
Bookstore/Library	22.00	0	22	0.00
Food Certs/Grocery	214.67	50	265	0.00
Hospitality	946.29	0	946	300.00
Miscellaneous Other	766.63	750	767	4,500.00
<b>Total 460.00 · Income - Miscellaneous</b>	<b>2,269.59</b>	<b>880</b>	<b>2,400</b>	<b>5,280.00</b>
<b>Total Income</b>	<b>463,549.53</b>	<b>98,146</b>	<b>560,436</b>	<b>591,000.75</b>
<b>Expense</b>				
		0		
<b>510.00 · Committees</b>				
		0		
Board	729.40	333	729	2,000.00
Caring & Concerns	0.00	17	0	100.00
Chalice Circles	0.00	42	0	250.00
Expenses - EVENTS	162.96	0	163	



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Hospitality/Coffee	651.02	67	718	400.00
Leadership Council	65.74	33	66	200.00
Membership	184.26	117	184	700.00
Newsletter	300.00	30	330	178.00
Public Relations/Publicity	152.25	117	152	700.00
Special Funds	-50.00	25	-50	150.00
Stewardship	506.03	333	506	2,000.00
<b>Total Worship</b>	<b>316.12</b>	<b>258</b>	<b>316</b>	<b>1,550.00</b>
<b>Total 510.00 · Committees</b>	<b>3,017.78</b>	<b>1,371</b>	<b>3,114</b>	<b>8,228.00</b>
<b>520.00 · Programs</b>		0		
<b>Total Music</b>	602.26	333	602	2,000.00
<b>Total Religious Education</b>	9,975.14	2,642	11,988	15,854.00
<b>Total Social Action</b>	1,158.08	819	2,694	4,915.95
<b>Total 520.00 · Programs</b>	<b>11,735.48</b>	<b>3,795.05</b>	<b>15,283.53</b>	<b>22,769.95</b>
<b>Total 655.00 · Payroll</b>	<b>100,686.40</b>	<b>20,540</b>	<b>121,026</b>	<b>123,238.00</b>
<b>Total 656.00 · Payroll Expenses</b>	<b>24,179.53</b>	<b>4,953</b>	<b>29,067</b>	<b>29,717.00</b>
<b>Total 710.00 · Administration</b>	<b>18,258.95</b>	<b>3,909</b>	<b>22,160</b>	<b>23,455.00</b>
<b>Total 730.00 · Property</b>	<b>32,628.31</b>	<b>6,811</b>	<b>40,939</b>	<b>40,866.00</b>
<b>Total 740.00 · Utilities</b>	<b>29,690.89</b>	<b>6,750</b>	<b>36,141</b>	<b>40,500.00</b>
<b>750.00 · UUA &amp; PSWD Dues</b>		0		
<b>PSWD Dues</b>	7,092.80	1,478	8,866	8,866.00
<b>UUA Annual Program Fund</b>	13,640.00	3,413	20,483	20,480.00
<b>Total 750.00 · UUA &amp; PSWD Dues</b>	<b>20,732.80</b>	<b>4,891</b>	<b>29,349</b>	<b>29,346.00</b>
<b>760.00 · Insurance</b>		0		
<b>Insurance - Prop/Liab/Theft</b>	4,101.52	1,313	5,315	7,880.00
<b>Total 760.00 · Insurance</b>	<b>4,101.52</b>	<b>1,313</b>	<b>5,315</b>	<b>7,880.00</b>
<b>810.00 · Mortgage Interest</b>		0		
<b>Bldg Mtg Interest</b>	32,409.40	6,467	38,876	38,800.00
<b>Total 810.00 · Mortgage Interest</b>	<b>32,409.40</b>	<b>6,467</b>	<b>38,876</b>	<b>38,800.00</b>
<b>Total Expense</b>	<b>440,716.38</b>	<b>90,450</b>	<b>533,717</b>	<b>556,700.53</b>
<b>Net Ordinary Income</b>	<b>22,833.15</b>	<b>7,696</b>	<b>26,719</b>	<b>34,300.22</b>
<b>Other Income/Expense</b>		0		
<b>Other Expense</b>		0		
<b>865 · Mortgage Principal</b>	27,591	5,717	31,531	34,300.00
<b>Net Income</b>	<b>-4,758</b>	<b>1,980</b>	<b>-4,812</b>	<b>0</b>

