

2017-2018

**Unitarian Universalist
Congregation of Phoenix**

**Annual
Report**

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Mission, Scope and Vision

Mission

Welcoming all in building religious community, called to
 share journeys,
 grow in spirit,
 advance justice.

Vision

To be a spiritual community for our time:
 Theologically Diverse
 Radically Inclusive
 Justice Centered

Scope

The Unitarian Universalist Congregation of Phoenix Annual Report is

- A mission-based annual report to the Congregation by the groups, committees and staff positions within the Congregation, which describes how each group, committee or position supports the goals and mission of the Unitarian Universalist Congregation of Phoenix.
- A compendium of the interests, activities and events in the life of the Unitarian Universalist Congregation of Phoenix over the last congregational year, published by the beginning of June each year.

Congregational Meeting Minutes

Congregational Meeting of June 2017

June 4, 2017

Agenda

- Call to Order: Glen Lockwood, President, at 11:45 AM
- Quorum Check: 93 members present (Vince Waldron & others, counters)
- Covenant of Commitment to our Congregation (Glen Lockwood)
- Review and approve Rules of Procedure (Glen Lockwood)
 - Motion: Smoot Carl-Mitchell moves to approve Rules of Procedure; Karin Quinn seconded
 Motion approved unanimously
- Introduction of Board Members (Glen Lockwood)
- Review Agenda (Glen Lockwood)
 - Motion: Board moves approval of February 5, 2017 Congregational Meeting Minutes; motion approved unanimously
- Board Report (Glen Lockwood)
- Financial Report (Heidi Parmenter). Heidi highlighted positive financial position due to increased attendance and new members, facilitated by increased staffing
- 2016-17 Strategic Implementation Plan Review (Rev. Susan Frederick-Gray).
- Stewardship Campaign Update (Rev. Susan)

- Very successful stewardship campaign, surpassing our stewardship goal. This allows UUCP to continue spreading our vision and attracting new members and children. Susan especially emphasized the strong growth of the Children’s Ministry and more social justice efforts with the addition of staff and staff hours
- Review 2017-18 Budget (Rev. Susan)
 - Questions and Comments: Is it too soon to learn results of the annual survey? Rev. Susan responded that the results were not yet ready, but they would be added to the end of the Annual Report within a few weeks. In the meantime, the Annual Report was available on the website regarding programs and activities this program year
 - Diana Ashley on behalf of the Finance Committee highlighted that Heidi Parmenter had been working a few hours per month for the Foundation Board, which greatly benefitted the Foundation’s work
 - A member asked why UUCP was paying moving expenses if Susan is elected for the interim minister? Rev. Susan indicated that the UUA does not have the resources and another member pointed out that UUCP was not incurring the expense of finding an interim because the UUA had done that
 - A member asked why the room usage/facility fee had not increased for DVLC’s use of UUCP facilities? Rev. Susan explained that the contract with DVLC defines terms for building usage rate. This year, the contract provides that building usage rate will be adjusted every three years based on the Consumer Price Index (CPI)
 - A member encouraged other members to prepay their pledges if they are able
- The Board moved approval of the 2017-18 budget, Pierre Tariot seconded; motion approved
- Capital Campaign Update (Rev. Susan for Richard “Duke” Plattner)
 - We have not yet reached our capital campaign goal, but we are within sight, and there are plans to help close the gap in the coming weeks and months. Susan explained that, if possible, it makes sense to do the work on the patio while we’re having other construction done because it will be the most efficient use of our resources
 - Questions and Comments: a member asked whether the work to be done included a facelift? Rev. Susan said that the work will, among other things, modify the upper parking lot and that the addition of an accessible ramp and improved landscaping would create a more open and inviting front
 - A member asked Rev. Susan to cover her ears, which she did, and he asked members to think about making a capital contribution as a legacy in honor of Rev. Susan
- UUA Presidential Campaign Update (Rev. Susan and Vince Waldron): Rev. Susan and Vince described the upcoming steps, depending on the election results. Vince explained that if Susan wins, Rev. Margret A. O’Neill will serve as our interim, likely for two years
 - Question: a member asked who votes in the election? Rev. Susan explained that delegates of UUA member congregations vote based on number of members in congregation. For UUCP, there are nine delegates who have already committed to vote for Rev. Susan. In addition, ministers affiliated with a congregation are delegates. For UUCP, they are Rev. Susan, Kathy Baughman, and Ray Manker
- Nominating Committee Report (Jenny Moats)
 - On behalf of the Nominating Committee, Jenny moves to elect the slate of Board nominees (Rajeev Arora, Tony Banegas, Mary Dawes, Sarah Moore, Karin Quinn, and Vince Waldron), several members seconded; motion approved

- On behalf of the Nominating Committee, Jenny moved to elect the slate of nominees (Daisy Danforth, Lynne Raabe, and Josh Turren) for the Nominating Committee, Pierre Tariot seconded; motion approved
- Installation of New Leaders: New leaders were installed to their positions
- Motion to Adjourn UUCP Congregational Meeting (pending UU Foundation Meeting): Gene Harvey moved, Bill Kesler seconded; motion approved

UUCP Board of Trustees (board@phoenixuu.org)

- Glen Lockwood – President (president@phoenixuu.org)
- Vince Waldron – Vice-President
- Jim Allen – Treasurer
- Sarah Carlson – Secretary
- Rajeev Arora – Trustee-at-Large
- Karin Quinn – Trustee-at-Large
- Caitlin Tuffin-Gaspar – Trustee-at-Large
- Ceyshe Napa – Trustee-at-Large
- Max Schweiger & Katie Quinn-YRUU Youth Reps

UU Foundation of Phoenix Annual Meeting (Smoot Carl-Mitchell)

- Call to Order and Introduction of UUF Board Members
- President's Report (Smoot)
 - Questions and Comments: a member asked about the rate of return and whether it was only 2%? Smoot explained that the rate of return was greater than 2%, but that 5% distribution to UUCP reduced it
 - A member asked what management fee was charged. Smoot said that he did not have the information at hand but would get it
 - A member asked whether there were competitive bids to manage the assets. Smoot responded that there were not for the current manager, but that there will be in future
 - A member commented that anyone can make a donation in honor of someone else by making a donation to the UUF. Heidi Parmenter added that she lets family members know when such donations are made
 - A member asked when the UUF would make \$200,000 donation to the capital campaign. Smoot explained that the donation will be paid out over three years (like any other capital donation) less about \$45,000 for line of credit to UUCP that was given this fiscal year
 - A member suggested that donations could be made in recognition of anniversaries or birthdays
 - Diana Ashley, a member of the UUF Board noted that the UUF is looking at ways to honor donors of past gifts, and asked for ideas, as a way to commemorate how past members have paved the way to UUCP's future
- Financial Report (Diana Ashley) Diana noted the positive balance in the UUF
- Nominating Committee Report (Jenny Moats)
 - Jenny on behalf of the Nominating Committee moved to approve Diana Ashley and Terry Lockwood as nominees to the UUF Board of Trustees, Dale Fisher seconded; motion approved
 - Installation of new UUF (Foundation) Board Members: New Board members were installed
- Motion to Adjourn: Tony Banegas moved to adjourn the UUF Annual Meeting, Bill Kesler seconded; motion approved

Congregational Meeting of January 2018

January 28, 2018

- Call to Order/Rules of Procedure/Quorum check at 10:30 AM by Vince Waldron, Board President
- Quorum Check: 75
 - “Fifty members shall constitute a quorum for all meetings of the Members of the Congregation.” – UUCP Bylaws
- Rules of Procedure (Vince):
 - Motion: Approve Rules of Procedure
 - Kathleen moved; Michelle seconded motion; motion approved (Rules of Procedure)
- Introduction of Board Members (Vince)
 - Board moves to elect Vice President (Karin Quinn) and Secretary (Ceyshe Napa); Richard Plattner seconded; motion approved
- June 2016 Congregational Meeting Minutes (Board has moved approval)
 - Motion: Approved June 2017 – Annual Meeting Minutes
 - Board moves to approve June 2017 UUCP Congregational Meeting Minutes; Pat Reed seconded; motion approved
- Mid-year Financial Report
 - Members of the committee were recognized
 - Heidi Parmenter highlighted the number and dollar amount of pledges from the 2017-2018 Stewardship and Capital Campaigns
- Capital Construction Update (Richard Plattner)
 - Meetings about construction began in Summer 2015
 - Congregation capital campaign giving exceeded expectations
 - The architect has finished the construction drawings
 - UUCP resides in the Town of Paradise Valley
 - The construction drawing, engineering reports are almost complete; 1 set has been submitted; expecting to get approvals for the permitting process; the architect is waiting permit approval then construction drawings can be completed, then can go to bids
 - First look construction numbers will not be known until the construction drawings are done and when bids are received
 - Construction looks good, but do not have numbers until about June
- Transition update and Search Process (Rev. Margret)
 - 2017-18 Strategic Ends and Goals (began in 2012) have largely been achieved
 - Rev. Susan has moved on to her position as UUA President in Boston and Emrys will be transitioning out of UUCP in April
 - General report on 2018-19 Strategic Ends, interim time goals, staff changes, and the Ministerial Search and Call
- Questions / Comments
 - Is the assistant being hired on a one-year contract?
 - Position is being advertised as a two-year contract
 - Clarify the regulations who can serve on the search committee
 - Need to be member in good standing
 - How big will the search committee be, and not just current people in leadership
 - Search committee = 7 people, with nominees then a contested election

- Congregation diversity, community diversity, people carry the voices and know how to hear the voices (good listeners and representative of the congregation)
 - Construction: Will we be getting a guaranteed price?
 - Yes, plus a cost- savings split if the cost is under
- Motion to adjourn (pending UU Foundation Meeting)
 - Vicki Meyers moved; Richard Plattner seconded; motion approved

UU Foundation of Phoenix Meeting of January 2018

The meeting of the UU Foundation of Phoenix (UUFPP) convened immediately following the close of the UUCP semi-annual meeting. A quorum was confirmed. In the absence of the current UUFPP President, Diana Ashley, the UUFPP Treasurer, Don Weir presented a summary of the financial status of the UUFPP. The meeting was adjourned.

Board of Trustees Report

Board of Trustees President: Vince Waldron

Board of Trustees: Karin Quinn, Katie Quinn, Mary Dawes, Ceysché Napa, Rajeev Arora, Jim Allen, Sarah Moore, Tony Banegas

Please list all special events/classes/workshops that your group held between July 2017 and June 2018, including date and number attending.

We held an orientation in August and a retreat in September. The board holds regular "chat sessions" on the third Sunday of the month, to promote interaction with congregation members. We also hosted a special congregational meeting on April 8 so the ministerial search committee could be elected.

What were the group's goals for 2017-2018?

In addition to our typical governance duties (see the Board policy manual), our job this year was to finalize strategic "ends" (long term goals), facilitate the transition of our interim minister, prepare the congregation for search, and conduct the congregational self-analysis that would identify strengths and weakness, and conduct a rigorous/transparent process in creating the search committee.

What key decisions were made in 2017-2018?

We accepted new End Statements, authorized the hiring of an assistant minister, completed the search committee election process, and initiated significant changes in committee and governance structures.

What challenges did the group face in 2017-2018 and how did you overcome them?

We welcomed several new members and a new minister. The learning curve was steep but with patience and good will we muddled through! The Board's Informal Governance Working Group meetings helped us talk

through board decisions in a personal and responsible way. I also learned to slow down the pace, to allow board members to "chew on" complicated decisions before we acted.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

Outgoing Board members Jim Allen, Karin Quinn, and Ceyshé' Napa have been superstars in their own unique ways, and also Rajeev Arora, who moved to Florida.

What does the group have planned for 2018-2019 and beyond?

Locating a wonderful new minister! We have our new strategic goals in place and will keep them firmly in mind as the board does its business.

Interim Lead Minister's Report

This has been a whirlwind year of change, endings and new beginnings at the UU Congregation of Phoenix. After conversations that had begun months before, I learned (as did everyone else) on June 24, 2017, that Rev. Susan Frederick-Gray had been elected President of the UUA and that I would be coming to Paradise Valley to serve as your Interim Lead Minister. I finished packing, put most of my winter clothes into storage and arrived in August to serve as your minister and support the transition to prepare this congregation for your next settled ministry.

During the late summer and fall my focus was on learning about this congregation, building my relationships with the staff and leaders and assuring continuity in the projects and commitments that had been started before I arrived. We launched a **follow-up Capital Campaign** to reduce the funding gap for the planned construction, even as we selected a contractor and moved toward the finalized plans and approvals. This project to support inclusion and connection in congregational life is well on its way to implementation. And of course, it has all taken longer than anyone could have imagined; as I write this in May we are still waiting for the Town of Paradise Valley to issue the final permits to proceed with construction.

Based on the new Vision that was adopted in June 2016, I facilitated the Board of Trustees in September as they identified new **Strategic Ends** to incorporate that Vision into the programs and activities of all the UUCP staff, committees and teams. The 2018-19 Strategic Ends are:

- **Theologically Diverse:** Rooted in deep understanding of various faiths and traditions, our congregation nurtures personal growth and the search for truth and meaning
- **Radically Inclusive:** Reaching out to embrace all, our congregation challenges itself to grow with new voices, ideas and experiences
- **Justice Centered:** Inspired by our UU values, our congregation is organized and empowered to act in advancing justice in our local and global communities

Those Ends were posted in the Johnson Room, congregational input was gathered, and a set of strategic initiatives has been identified. In that way, the Vision and Strategic Ends will serve as the framework for staff work plans and team charters over the coming years

About 30 people participated in a **Transition Start-up Retreat** in October in which leaders and staff identified three areas of focus to prepare for the future during this time. Three goal areas were identified, and work is under way on each of them:

1. **To partner with downtown congregation or organization for social justice projects.** Expanding on our established relationships with Puente, Chispa, Center for Neighborhood Leadership, Phoenix Restoration Project and other justice-centered Phoenix organizations, we have been deepening those partnerships and expanding our interfaith connections. As a trusted partner with several organizations, UUCP served as fiscal agent for donations to support DACA application scholarships last fall. We are participating more extensively with the Arizona Faith Network and have begun to develop a promising partnership with the First UCC congregation on 2nd Street downtown. The UCC church served as the site for the collaborative interfaith service prior to the Women’s March in January, and we continue to explore the potential for expanded collaborations on workshops, programs and community presence.
2. **To support congregational leadership by streamlining and increasing transparency, access and understanding of policies, processes, programs and resources and by cultivating and mentoring for leadership.** A Governance Task Force organized this year to begin work on updating Board policies and reviewing coherence in all congregational policies and processes; a Safety Team is organizing to update and consolidate Safe Congregation and other related policies; a Leadership Development Team has begun working to assure that the skills and perspectives throughout the congregation are identified, developed, supported and honored.
3. **To develop capacity in the congregation as ambassadors both internally and externally.** Along with the continuing work on anti-racism and dismantling White Supremacy, we are planning for programs on multicultural competency, a revitalization of the Covenant of Right Relations, and expanded training in “Welcoming vs Othering” to deepen the capacity for radical inclusion throughout the congregation.

The profession of intentional interim ministry identifies **five areas of focus that support a congregation to move through a healthy transition and prepare for the future.**

- **Heritage:** In addition to my learning from long-term members and leaders in the congregation, all were invited to participate in creating a “history wall” of personal experience here during March and April. Understanding the complex heritage of the congregation, including both strengths and struggles, informs the work of living your mission and vision and shapes the search for your next settled minister
- **Leadership:** Strong congregational leadership is vital to creating a healthy future. A Leadership Development Team of Susan Goldsmith, Glen Lockwood, Kim St Clair and Smoot Carl-Mitchell, with staff support by Janine Gelsinger, is designing a multi-layered leadership development initiative for first steps of implementation next year
- **Mission:** The Strategic Ends and implementation plans that will guide programming beginning this summer are grounded in the Vision of this congregation as you continue to live into your mission
- **Connections:** Local connections are continuing to be strengthened in this time, particularly in interfaith and social justice. National and Regional UUA resources (providing guidance, consultation, facilitation and training) actively support the Ministerial Search process, as well as deepening capacities for multicultural awareness and welcoming
- **Future:** Using an extensive process of outreach to the congregation, the Board took the lead to assure widespread congregational understanding of and input into the Ministerial Search process and to facilitate the election of a strong and representative Ministerial Search Committee (MSC). In the coming months, the MSC will study the congregation, prepare descriptive materials, connect with prospective ministers and identify a ministerial candidate to be considered for call to the settled ministry here in spring 2019

Transition Team: The Transition Team (Gary Ezzell, Susan Goldsmith, Jan Kaplan, Sam Kirkland, Glen Lockwood, Kim St. Clair, Don Weir, Dale Wiebusch) was created in Fall 2017 and formally commissioned in the Sunday service on December 10. This wise group of congregants meets monthly for discussion and

planning and works in various areas of congregational life to support the process of this time of transition, creating a solid foundation for the next ministry.

Small Group Ministry: I provided a training workshop for Small Group Ministry facilitators in December and continue to support this program in the transition to new leadership. There have been 11 groups meeting during this year, and I hope to build group leadership and develop strategies to sustain and expand the program in the coming year.

Stewardship Development and Financial Integrity: The 2018-19 pledge drive was implemented this year by diverse specialized teams to involve more people and distribute the workload. We had 35 Connectors doing outreach visiting, and three orientation session opportunities were offered for Connectors. Events included a Leadership Event on Sunday March 25, pledge drive start-up with special coffee hour on Sunday April 1, requesting all pledges be returned by April 30, follow-up emails and phone calls the first week of May, and a closing recognition with special coffee hour on Sunday May 6. Congregational leadership and engagement in the stewardship process will be further deepened and expanded in the coming year.

Since UUCP operates on a July-June fiscal year, final numbers on budget performance are not in as of May. The Board has authorized a professional audit of the congregation's books and processes a Request for Proposal has been sent out to auditing firms and bids are being sought for implementation next year.

Staff Transitions, Assistant Minister: In a time of transition, change is the norm. With Emrys Staton's departure from the staff on April 30, we transitioned his portfolio of leadership responsibilities (Pastoral Care, Social Justice, Small Group Ministry) to the Lead Minister, which enables me to experience and better understand the full range of ministry in the congregation. Janine's Gelsinger's position title was changed this year to Director of Membership and Welcoming Ministries, and she will be taking a more formal staff support role in Leadership Development and Adult Faith Development. In August Anthony Johnson will join the staff in the newly established position of Director for Congregational Life, which will become an Assistant Minister title once Anthony is in Fellowship with the UUA. Anthony and I, along with the other staff, will systematically review the distribution of staff roles in supporting congregational ministries as we sustain vitality and prepare to support the arrival of a new Lead Minister in August 2019.

It is a rewarding challenge and an abiding joy to serve the UU Congregation of Phoenix in this transitional time. I am grateful for all the wisdom and energy I have found here, and I look forward to another exciting and productive year of change and emergence.

Staff Reports

Business Administrator

As the Business Administrator, I work closely with the following groups, each of whom have their own individual reports:

- Finance Committee
- Stewardship Team
- Construction Committee
- Unitarian Universalist Foundation of Phoenix

Property Management Report

This year we hired a professional crew to perform ongoing weekly landscaping for our property and the results have been amazing. Our campus is now well manicured, clean, and repairs are being done in a timely manner. We have an aging main water line that is falling apart and needs to be replaced. We are waiting to replace it once the construction happens. In the meantime, we have had quite a few patches to complete. Last summer we got hit with a vicious monsoon that destroyed over six trees on the property. One of the trees took out a large chunk of the fence along 40th place.

The roof over the Annex buildings was redone this year, and now all our roofs are up to date with maintenance. All of the soffits and overhangs on the main building were restored and repainted. By the end of the fiscal year, we hope to have the Annex building soffits restored as well.

Dale Fisher researched, chose vendors and oversaw the installation of a projector and screen in the Sanctuary.

Richard Plattner and Susan Morris donated a large flat screen TV that we had mounted to the wall in the Johnson Room.

It was decided to install river rocks in the Memorial Garden pool instead of water until a permanent solution to the water leak issues in the pool are found. Monthly campus work days were attempted October through April. They were not as well attended as in years past and a few had to be cancelled due to no RSVPs.

Respectfully Submitted, Heidi Parmenter

Director of Children's Ministries

See Children's Ministry Report

Director of Pastoral Care & Justice Ministries

This was a fast-paced year that began with the congregation's transition into a period of interim ministry, welcoming Rev. Margret O'Neill to follow on the heels of Rev. Susan's departure to lead the Unitarian Universalist Association. In the realms of pastoral care and social justice, the past year was affirming of UUCP's strength as a beloved community.

In the fall I traveled twice to Boston. The first trip was in September to go before the Ministerial Fellowship Committee, which is the final step in the process of ordination as a UU minister. After the interview the committee asked me to do some more preparation work and set up another appointment in a year. After much reflection, I decided to end my pursuit of fellowshiping and ordination and to return to my aspirations of community ministry and activist chaplaincy.

My second trip to Boston was to be trained as a program leader with the UU College of Social Justice, a joint project of the UUA and UUSC. I co-led my first delegation of youth on a trip to Tucson to explore border and immigration justice issues in April of 2018.

In support of district and regional UU work, I attended the Walk the Walk justice leadership development camp at de Benneville Pines, co-hosted by UU Justice Arizona Network (UUJAZ) and the UU Justice Ministry of

California (UUJMC). I have also continued my role as an adult chaplain at our week-long youth camps in summer and winter at de Benneville Pines. In September, I attended the Labor Day weekend family camp at SAWUURA.

Just as I feel like I've really gotten to know our congregation, my position as Director of Pastoral and Justice Ministries was due to hit the 2-year time limit on my waiver to stay beyond the typical 10-month internship. I've worked closely with Rev. Margret and the rest of the staff to bring my time at UUCP to a close on April 30, 2018. As I look for a new job and career path away from congregational ministry, I will continue my UU work through the College of Social Justice, Camp de Benneville Pines, and the Western Region as a staff member of the Goldmine Youth Leadership School.

Pastoral Care:

The congregation was shocked to learn of the death of Celso Mireles in a motorcycle accident on August 1, 2017. Celso had delivered the sermon, "Resolving Resentment Towards a God Not of My Understanding," the Sunday before he was killed. Our Unicare and Memorial Services ministries worked closely with Celso's wife, Ileana, and a group of Celso's friends from the broader immigration justice movement, to host an open casket viewing in our sanctuary on August 7. His family arranged for a Catholic mass and burial at Holy Cross Cemetery the following day. Rev. Margret officiated a memorial service in Spanish for Celso on August 26.

I officiated memorial services for Sandra Schaffer (July 8), Curt Yeager (August 5), and Joe DeMarco (January 20). The DeMarco service was specially planned by Ginny DeMarco, along with Benjie Messer, who put together a 4-person band, to be a musical eulogy of Joe's life. Outside of the congregation, I also supported UUCP families for memorial services for Linda Vance's son, Brian Vance, and Amy Miskell's mother, Nancy Bell.

Our Unicare ministry has continued to provide support and outreach to the community under the leadership of Vicki Meyers. Meal trains, visits, cards, and other forms of support are coordinated through the Unicare email list. I've coordinated the pastoral care with Rev. Margret, including helping several individuals and families with financial assistance from the minister's discretionary fund. We are grateful for the generosity of the congregation to have this fund available.

Justice Ministries:

As we continue to live in the politically corrosive environment under Trump, we've seen increased organizing and resistance efforts. Many UUCP members showed up to protest in downtown Phoenix during Trump's visit on August 22, and several were caught up in the police's violent tactics used against the crowd. While I was out of town that week, I was able to help with a coordinated action to interrupt a Phoenix City Council meeting where we allowed for four hours of testimony to be presented to the mayor and council regarding the police violence.

On September 5, the federal government announced that they were phasing out the DACA program. We were contacted by the Center for Neighborhood Leadership to host a DACA scholarship fund that would help eligible youth and young adults pay for the application or renewal fees before the window of opportunity closed. Through the congregation's generosity and outside fundraising efforts, more than \$20,000 was collected and distributed to CNL and other partner groups.

Our congregation collaborated with two different UCC churches to support movements in the community. For the Women's March, we worked with Rev. James Pennington at First Church UCC to host a women-led service the morning before the march started. Music from UUCP's Re-sisters really brought that service to life! For the March for our Lives, we worked with Rev. Gloria Smith at Encanto Community Church to host a service focused on gun violence in schools, featuring speaking and singing from UUCP youth Dylan Lifschitz, Ashley Perez, and Sarah Smith. Many teachers, students and parents in UUCP have all been deeply engaged in the various campaigns supporting education funding, stricter gun controls, and challenging the private school vouchers.

Several UUCP members attended the UUJAZ Issues and Action Day on October 14. The annual Day at the Legislature in February, coordinated by UUJAZ, brought about forty UUCP members to the state capitol to meet with senators and representatives. UUCP hosted a youth overnight to encourage teens from other congregations to show up at the capitol. Many youth from our congregation attended, but none were able to come from other congregations.

I ended my time serving UUCP on April 30. I'm deeply grateful for the opportunity to be a ministerial intern and the director of pastoral and justice ministries. UUCP is an incredible congregation with a generous spirit that has inspired and humbled me. I have entered into a covenant with Rev. Margret that is customary for outgoing ministerial staff in which I've agreed to not attend UUCP services or remain involved in the congregation. I will also refrain from offering any kind of pastoral care or officiate rites of passage for UUCP members and instead refer those back to the current ministers.

UUCP will always have a special place in my heart, and I look forward to hearing about all the amazing things you all will continue to do!!

Emrys Staton
Director of Pastoral & Justice Ministries

Music Director

UUCP's music program has continued to fly forward with momentum and energy. As I describe this year in UUCP's musical life, I'll do my best to name all of the people who have been a part of it. Thank you all!

ENSEMBLES

Choir: The choir's big highlight this year was collaborating with the choir of Chandler's Valley UU congregation to present Street Requiem, a contemporary 45-minute work honoring those who have died while homeless. We performed it at two UUCP services, a Valley UU service, and an afternoon concert in a Methodist church presented by the Tempe Interfaith Fellowship. Street Requiem is still unpublished, and our performances were the Arizona premieres. It's a deeply moving work. Many tears were shed by both singers and listeners. Our collection at UUCP to benefit a school serving homeless children raised \$2000, double what UUCP usually raises on a share the plate Sunday. I was very proud of our choir and also proud that UUCP provided the majority of the musicians in the 15-member orchestra and the majority of the vocal soloists.

Another fall highlight was singing at the memorial concert Virginia DeMarco created for her late husband Joe, who was known to many in the choir. I'll list here the names of everyone who was part of the choir this year, including those who only sang with us briefly: Simon Allardice, Carolyn Allenby, Ellie Anderla, Myra Banks, David Boecker-Grieme, Uli Boecker-Grieme, Charlotte Carl-Mitchell, Smoot Carl-Mitchell, Greg Chrzczon,

Ruth Crowley, Virginia DeMarco, Kat Dickson, Madelyn Doerr, Dale Domzalski, Alec Featherston, Donna Featherston, Donni Fleischaker, Natalie Fleischaker, Mikall (previously Sarah) Foerster, Deborah Gordon, Laurel Hardin, Emily Helton-Riley, Glenda Henman, Sharon Hise, Adrishanti Iyer, Melinda Iyer, Sara Iyer, Peter Jackson, Sue Kinsman-Barnes, Christina Kinsman-Barnes, Sam Kirkland, Jean Lawton, Dale McCurdy, Joanne Michael, Susan Morris, Kathryn Peacock, Alisa Philips, Richard Plattner, Karin Quinn, Rosemary Roenfanz, Amanda Rogers, Teresa Simone, Heidi Singer, Phil Slater, Bill Snowden, Donna Talbot, Sandy Thomson, Jerry Whalin and Jami Wilson.



Our choir's first meeting with Rev. Margret

Many have taken additional leadership in choir that deserves mentioning. Madelyn Doerr sewed us a beautiful new set of stoles in time for our Christmas services. David Boecker-Grieme, Glenda Henman, Sam Kirkland, Susan Morris and Heidi Singer have all led hymns in services while I was away. For a fall "teach-in" during service about institutional racism, Heidi created and led a 25-minute anti-racist song circle. This year's "choir shepherds," who kept personal connections with those in their sections and checked in when people went missing, were Peter Jackson (basses), Bill Snowden (tenors), Donna Featherston and Charlotte Carl-Mitchell (altos), Sharon Hise and Susan Morris (sopranos). Dale McCurdy, a former choir director, continued to meet with me this fall as a "choir coach," which was tremendously helpful. Charlotte Carl-Mitchell has continued to welcome new members to the choir and moderate the choir email list; she also took most of the photos in this report. And I'm grateful to Rose Pascoe for reliably providing childcare during choir rehearsals all year.

Orchestral Ensembles: Last year saw two services with an orchestra including both children and adults on strings, winds and percussion. This year, we planned three services: Ingathering, Christmas, and Flower Communion. The first two were joyful high points, and I expect Flower Communion to be similar. These orchestras have included Elyse Arring, Colin Boecker-Grieme, Ian Boecker-Grieme, Aaron Ford, Liz Galpin, Gabby Gareau, Emily Helton-Riley, Adrishanti Iyer, Sara Iyer, Anne Lackey, Dylan Lifshitz, Susan Morris, Ceyshe Napa, Ethan Peacock, Ashley Perez, Elijah Prescott, Nancy Schwartz, Alison Tobin, Colley Tobin, Sawyer Tobin, Don Weir, Sandy Weir and Jerry Whalin. I haven't had time to lead our brass group, and a new clarinet quartet played one service in August and then stopped for the same reason, but Open Strings, which includes eight adults who play bowed strings, is led by Susan Morris and has played many services this year.

ReSisters: One of our most consistently captivating groups is ReSisters, made up of singers Bonnie Cunningham, Glenda Henman and Heidi Singer. In August they led a powerful all-music service about women's lives in which they invited a large group of women from the congregation to join them in the song "Quiet."

Jazz: Jack Wisniewski has continued to lead our jazz ensemble, which includes Patrick Carroll-Jackson and Russ Braman. Jack is now gigging regularly, including at other churches, and has often invited special guests to join him in our services. I'm grateful that as his musical network and opportunities continue to expand he continues to make time to play at UUCP.

Pickers and strummers: Carolyn Allenby has continued to use music to create community both inside and outside of our Sunday services. With Joan Gale, she led a six-session class which taught members how to play the ukulele through Unitarian Universalist songs. She has also continued to coordinate our UU Ukulele and Friends Song Circle, which makes music on the patio between services and is open to and inclusive of all ages and instruments. This circle is often the first stop for pickers and strummers new to the congregation, and many visitors to this group have offered music in services. This year, the pickers, strummers and friends who have played at UUCP include: Myra Banks, Ann Bixel, Robert Bowe, Susie Bowe, Russ Braman, Sara Burchard, Christine Carmona, Linda Crossett, Bob Davis, Sharon Day, Susan Deveirin, Dale Domzalski, Joan Gale, Caitlin Gaspar, Igor Glenn, Ross Hart, Gene Harvey, Peter Jackson, Joan Laurence, Jean Lawton, Lois Leader, Cathy Maxwell, Michael McBeath, Joanne Michael, Joan Myer, Jerry O'Neal, Alisa Philips, Paul Playford, Rosemary Roenfanz, Amanda Rogers, Teresa Simone, Bill Snowden, Sandy Thomson, Jerry Whalin. Two excellent guitarists moved away last year, Justin Randall to the west side of Phoenix and Roy Riegel to Maine - and both are missed.

Accompanists: Pianist Mary Cota has continued to be a reliable, sensitive and dedicated collaborator, both in choir rehearsals and in services. When our next budget year begins in July, UUCP will begin paying her as an employee rather than an independent contractor, which will make her eligible for raises and other benefits. Often when Mary was unavailable this year, I was lucky to work with Heather Goldman, a frequent visitor to UUCP and an excellent collaborative pianist.

Audio/Visual technicians: UUCP's crew of audio/visual technicians this year included Robert Bowe, Smoot Carl-Mitchell, Elena Perez, Brian Quinn, Reggie Watson, and Francis Wiget. All have been reliable, professional, calm in the face of stress, and willing to arrive early to set up when necessary. Reggie Watson has continued editing and posting audio recordings of our sermons to our soundcloud account and sermon podcast. After much research, Dale Fisher made two major audio/visual updates to the sanctuary this year. In the fall, he changed the overhead light bulbs to LED, which last longer, provide more light and use less energy. In the spring, he worked with Rev. Margret to install a large screen and projector in the sanctuary, which will be a huge asset for services and events involving video.

KEY RELATIONSHIPS

Children and Youth: For the second year, I worked with Director of Children's Ministries Katie Resendiz to choose and teach hymns to the children's ministry team, who then included them in our children's weekly classes. The hymns matched our monthly worship themes, and this year, with Rev. Margret's support, they became a regular part of worship services. They've served as "hymns of the month" for both adults and children, and as a chance in each service to acknowledge a connection between our adult and youth programs.

Indigenous music: Last year, three of our Mexican-heritage members, Celso Mireles, Ileana Salinas, and Sylvia Sharma, met regularly with me to teach me music of people of the southwest, both in Spanish and in indigenous

languages, and to help me make that music more central at UUCP. Celso was killed in a tragic traffic accident in August, just days after preaching in our pulpit, and the shock of his death has echoed through the congregation all year. His wife Ileana found it too painful to continue attending UUCP. Sylvia took a lead role in this fall's Dia de los Muertos service, dedicating it to Celso's memory, and the choir performed two songs in Nahautl during that service that she had taught me during those meetings.

NOTABLE EVENTS

Quiet Music in the Garden: Russ Braman continued to offer music in UUCP's memorial garden before first service. While he rarely attracted more than a few attendees at a time, his gentle playing created a perfect setting to experience the beauty of our campus. Russ has also been one of my top pinch hitters in service this year, jumping in to support a wide variety of other musicians and groups, and I deeply appreciate his musicianship and friendly attitude. He is moving away from Phoenix this summer and will be missed.

Cabaret: For many years UUCP held a spring show known as Cabaret. This tradition had been dormant for several years, and was given a fresh start this year by new member Greg Chrzczon, who has worked in musical theater extensively as an accompanist. Greg had a vision for the show, ran auditions, chose songs to fit each cast member, and led countless individual and group rehearsals from the piano. The show was titled "The Spirit of Broadway," and consisted of songs from Broadway musicals, touching on spiritual qualities such as hope, friendship and making a difference. Our cast included Myra Banks, David Boecker-Grieme, Kat Dickson, Donna Featherston, Aaron Ford, Deborah Gordon, Laurel Hardin, Glenda Henman, Peter Jackson, Sam Kirkland, Ashley Perez, Alisa Philips, Karin Quinn, Katie Quinn, Amanda Rogers, Nancy Schwartz, Heidi Singer, Phil Slater, and Josh Tures, as well as emcee Richard Plattner. We offered an evening of professional-quality theater, with a cast that was fully off-book and sang their hearts out, accompaniment by a nine-person orchestra, blocking and choreography and true theatrical lighting programmed to the action. The cast, crew and audience were almost uniformly thrilled by the experience, and I was proud and pleased. The evening raised about \$2000 for the minister's discretionary fund, which helps members and visitors in financial need.



The Cabaret Cast

Theater requires a lot of work behind the scenes, and our production team deserves special thanks. As stage manager, Karin Quinn spent hours every week staying in touch with the cast, coordinating rehearsals, dealing with conflicts large and small, and helping me and Greg with logistics. Kat Dickson was Karin's assistant; she made our sanctuary look like a dinner theater through a combination of art and bargain shopping. Both attended many late production rehearsals with me and Greg. Jim Sorgatz managed seating, ushers, ticketing and food and beverage sales, which required recruiting and supervising a team of twenty volunteers. Elena Perez did sound design and operation. A friend of Greg's, Jeff Klein, helped us select, hang and program the lights. Alisa Philips helped with lighting design and was our backstage audio technician, and Reggie Watson ran our lighting board. Teresa Simone stepped in as stage manager during tech week. Sarah Moore designed our program, tickets and poster, and office assistant Geoff Anderla provided administrative help. Director of Pastoral and Justice Ministries Emrys Staton, together with Dale Fisher and Jake Danforth, installed two new electrical circuits in the sanctuary closet to allow us to run theatrical lighting. Greg, Susan Morris and Simon Allardice all contributed arrangements for our pit orchestra, which included Elyse Arring, Ethan Baxley, Patrick Carroll-Jackson, Greg Chrzczon, Susan Morris and Jerry Whalin as well as Nonie Bernard and Rick Hinrichs from Valley UU and high school student Joseph Martin-Long.

Community Dance: Carolyn Allenby coordinated a spring community dance, bringing a Contra dance caller, fiddler and percussionist to our sanctuary. About thirty people attended and enjoyed themselves!



At our community dance, the group circles to the right.

Guest artists: Phenomenal local jazz pianist Nicole Pesce played two services, as did UUCP's former pianist Lynne Haeseler. Valley UU's handbell choir joined us in January. Rabab virtuoso Qais Essar's trio provided traditional Afghan music for a service on Unitarian Universalism and Hinduism and followed that up with an evening concert in our sanctuary. And guest clarinetist Erin Finkelstein will soon play at a service and then present an afternoon concert in our sanctuary with two members of the Phoenix Symphony.

Services in the Community: Before two of the biggest rallies this year - the "March For Our Lives" after a prominent school shooting, and the second global women's march - interfaith services were held at UCC churches. While those services weren't planned by our congregation, Director of Pastoral and Justice Ministries Emrys Staton was supporting the service planners, and neither had ideas for music. In both cases, UUCP musicians stepped up to provide music at the last minute. The service before the "March for Our Lives" featured UUCP youth musicians, and the service before the women's march featured music by ReSisters. Both were high points of those services, and I was very proud that our musicians were taking this kind of leadership outside of our congregation.

Hymn Sings and Other Events: I led a service of labor songs over Labor Day weekend, which was a pleasure to research and present. Member Sam Kirkland, who is both an incredible singer and a career labor organizer, led the congregation in Solidarity Forever. I also prepared and led music for the first UUCP Passover Seder in recent memory.

NONMUSICAL THINGS

Summer service planning: June of 2017 ended with our lead minister, Rev. Susan Frederick-Gray, being elected president of the Unitarian Universalist Association; so July began with a heartfelt farewell service. I had taken on the responsibility of filling the pulpit for our summer services, and I coordinated a wide variety of guest speakers with insightful perspectives. I was proud of those services, but it was also a relief when our new interim minister, Rev. Margret O'Neill, arrived at the end of August and relieved me of that duty.

Cleaning with Susan Morris: As my sponsor in the UUA's Music Leadership Certification Program and the choir's music librarian, Susan Morris has been a huge support this year, spending two hours each week working directly with me one-on-one. We have spent much of this time going through cabinets, drawers, piles and files, getting rid of things that the music program no longer needs and organizing what remains. I am beyond grateful to Susan for supporting me in this badly needed deep cleaning.

Identity Nights: For the second year, I coordinated a series of fall Identity Nights at UUCP in which people in our community got to know each other through confidential sharing around issues of identity. This year we met based on sexual orientation, class background and race. Our team of facilitators included Donna Featherston, Susan Goldsmith, Michele Morgan, Ceyshé Napa, Joan O'Connor, Rhia Schaudt, Jim Sorgatz, Josh Tures and Libby Walker, as well as three staff members: Janine Gelsinger, Rev. Margret and Emrys Staton. While people still generally reported that these nights were powerful and interesting, I heard more people say that they didn't feel "challenged," a signal that the oppressions involved this year - homophobia and classism - were more confusing for me, our leaders and our participants than last year's topics of sexism and religious intolerance. Also, we saw a slight decrease in attendance. 75 different people attended at least one night this year, while 92 had attended the year before. I assume this is because I didn't preach a sermon encouraging people to attend, as I had the year before. I found myself working far more this fall than I was contracted for; so because this program was demanding and unrelated to music, Rev. Margret took it off of my hands in October and then put it on hold because no members stepped forward to lead it. I am grateful to Rev. Margret for her help in cutting back my hours, and I'm sorry, but not surprised, that the program has not continued. I think these evenings were good steps for our congregation toward its vision, and I hope they can provide a model for similar work in the future.

Respectfully submitted,

Benjie Messer

Office Assistant

As Office Assistant, I oversee the publicity committee, most publications, the database, room usage, and supervise the office volunteers.

I started my position here at UUCP as the Office Assistant in August of 2015.

We started the practice this year of sending out Horizons to only UUCP members unless otherwise specifically requested. We cut down the number mailed from almost 550 to just over 300. This saves the Congregation almost \$400 annually. Elyse Aarring continues to edit the Horizons each month, and we are grateful that she continues to do this. We are also very grateful for the numerous volunteers that come to UUCP once a month to help fold, sticker and label the Horizons to prepare for mailing them.

Sunshine Watson has taken over duties as the Facebook volunteer and has continued posting photos and UUCP information. We have gained an additional 100 “likes” on the page which continues to spread the work of Unitarian Universalism and UUCP.

We have several office volunteers that help keep the place running during the week. Don Weir does the welcoming duties for all the new visitors as well as the weekly deposit. Pat Reed joined us again this year to help out in the office where we need it. She is always eager to help out, even if that means cleaning and sorting the supply drawers that might not have been cleaned for many years. Pauline Peverly has been coming to UUCP for years and is such a huge help in the office. Julie Smart is our master at putting together the Sunday announcements and the order of service for us on Fridays.

I am also grateful for Bonnie White who proofreads the Order of Service and Sunday announcements every single week for us and was generous enough to proofread this entire Annual Report again this year. I would also like to thank Rebecca Rae Murans who creates all the amazing welcome screen images that we see on Sunday morning in the lobby. Rebecca also redesigned the latest cover for our Orders of Service.

The big news is that I helped oversee the implementation of the new member database. We started using a new product from our current church database company called Realm, from ACS Technologies. The new system will help staff immensely and save time. We will also have a much better ability to track member engagement.

In addition to being the Office Assistant here at UUCP, I am also the Camping Ministries Director for Camp de Benneville Pines. I help plan and execute 9 different camps throughout the year at the UU member-owned camp in southern California. This other job means that I am away at the camp for 4 weeks in the summer, 1 week in winter and 3 other weekends throughout the year. I am very grateful to everyone here at UUCP, especially Rev. Margret and Heidi, for allowing me to attend camp during these times.

Respectfully Submitted by Geoff Anderla, Office Assistant

Committee and Ministry Reports

Advancing Justice

Name of Leader of Group/Committee: Judith Breuer

Members of Group/Committee: Paisley Rossetti, Sandy Weir, Susan K. Morris
Sunday staff: Stacey Shcolnik, Sarah Carlson, Chris Mann, Lynn MacVean, and Dan Hunn

Please list all special events/classes/workshops that your group held between July 2017 and June 2018, including date and number attending:

Talk with Kate Brophy-McGee (30 attended). Training with the Phoenix Restoration Project (20 attended). Interfaith service to support March for Our Lives. Three letter writing sessions to detainees (6-10 attended) Integral support for UU Day at the Legislature (set-up, registration).

What were the group's goals for 2017-2018?

We started without a firm plan but soon developed a rhythm of providing Sunday actions for the congregation at the Justice Table. We also were physically present at the capitol, marching and delivering our postcards.

What key decisions were made in 2017-2018?

- Focus on Arizona issues
- Share minutes and pulpit announcements with the Interim Minister
- Maintain complete chronological records of our group for congregational continuity

What challenges did the group face in 2017-2018 and how did you overcome them?

Faced with national and local hostility to our values, we decided to take one step at a time. We unofficially partnered with Puente through Ben Laughlin.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

- Emrys Staton for his vision and expertise
- Ben Laughlin for his input
- Rev. Margret A. O'Neill for her unflagging support

What does the group have planned for 2018-2019 and beyond?

- Partnering with the Center for Neighborhood Leadership
- Advancing our knowledge of the state legislature
- Continuing awareness of the congregation's needs and issues vis-a-vis social justice
- Represent the voices of the grassroots oppressed

Children's Ministry Committee

Name of Group/Committee: Children's Ministry Committee

Members of Group/Committee: Katie Resendiz, Carrie Lifshitz, Laurie Arora, Cherilyn Walley, Francis Wiget, Lynn MacVean, Jonathan Lifshitz, Mikall Foerster, Jen Hempel, Janine Gelsinger, Ceyshe Napa, Sarah

Montgomery, Laurie Arora, Kathleen Waldron, Jeff Newman, Sam Kirkland, Tiffany Mendez, Daniel Mendez, Christine Marshall, Savannah Sanders, Rose Pascoe, Lora Gufstafson, Caitlin MacClaren, Bob Davis, Mary Kate Eckles, Oliver Migliore

Please list all special events/classes/workshops that your group held between July 2017 and June 2018, including date and number attending.

Children's Ministry Activities 2017-2018		
Weekly Sunday Programming	Weekly	Infant and Toddler Care 3-4-5 zUUm 3 Studios 6th Grade 7th/8th Grade Owl YRUU 2nd Service
Celebrations, Ritual, and Worship	December 17	Children's Chapel Solstice Service (41 people)
	February 11	Children's Ministry Sunday (congregation wide)
	March 4	International Women's Day (congregation wide)
	April 22	Earth Day Children's Chapel (54 people)
	May 5	Children's Ministry Celebration (63 people)
	May 20	YRUU Sunday (congregation wide)
Teacher Training and Curriculum	August 19	RE teacher orientation (15 people)
	December 17 March 31	RE Teacher Retreat (10 people)
	December 29	Special Curriculum Planning Retreat (5 people)
	January 8	Coming of Age Curriculum planning (3 people)
	January 2018	Special Curriculum: Media Literacy: Heroes and Villains
	January 21st March 24th	YRUU Advisor Training (7 people)

	May 27th	YRUU Advisor Retreat (after report submission)
	May 26th	OWL Facilitator Retreat (after report submission)
	Every Other Sunday	Children's Ministry Team Meetings (average 7 people per meeting)
	September 10	Family Orientation (57 people)
OWL Programming	November 10 January 6	7 th and 8 th Grade OWL Overnight (November: 38 people, January: 53)
	September 17 - December 10	1st and 2nd Grade OWL (21 people)
	October 1 - April 29	7 th and 8 th Grade OWL (57 people throughout the year)
	February 15 - May 5	5 th and 6 th OWL (31 people)
	every other Sunday October through April	OWL Parent meeting (14 people)
	September 17 th , 24 th , 28 th and October 5 th	OWL Parent Orientations (39 people)
	October and January	OWL Overnights: (26 people)
Social Justice	January 6	Save Our Schools March
	January 15	MLK March
	January	Women's March Poster Making Event
	March 23	March for Our Lives: Combined Service and Overnight (28 people)
	March 24	March For Our Lives
	April 26-27	#RedForEd High School Sites (14 people)
Middle School Programming	November 17-18 January 12-13	mUUGs Overnights (14 people)
High School Programming	October 14	YRUU Overnight (22 people)
	February 18	YRUU Sunday night overnight (22 people)

	February 19	UU Day at the Legislature UU Kids Rock the Legislature! (8 youth and middle school attended)
Kids Kamp	June 4 - 28	Projected 110 campers, 6 junior counselors, 7 counselors, 18 staff
Childcare		Childcare for Adult Faith Development; Evening Activities, and Community Events - approximately 20 events

Attendance and registration increased across all regular Sunday programs. A total of 203 children attended programming. Of those, 174 completed registration. On average children attended 1 programming day per month (this does not include multi-gen services or days they chose to be part of worship in the sanctuary or volunteer on campus). This is consistent with national trends defining regular attendance to be once a month.

Other Activities Not Date Bound:

- Provided Technical assistance to other congregations on the topics of inclusive classrooms, studio system, community based OWL panel, teacher training, and multi-generational community building
- The upstairs storage room reorganized and repurposed to include workspace for Music Ministry, Children's Ministry, and the Archives
- Established a table in the sanctuary to provide space for those who are better engaged in worship when their hands are occupied. This includes quiet activities, marked hymnals, felt projects, coloring, orders of service, varying heights of chairs, and blanket space on the floor
- Continued collaboration between the Music program and Children's Ministry to ensure multi-generational participation

What were the group's goals for 2017-2018?

For the 2017-18 year, we successfully met our goals to:

- Enhance the 6th Grade curriculum base
- Continue to modify the studio program for greater success
- Add a childcare provider for the young students
- Implement children's experiences at social justice events
- Implement plan for OWL in the greater community
- Provide targeted training for teachers working in multi-age learning environments and teachers working with middle and high school students

What key decisions were made in 2017-2018?

In a continued effort to provide creative and responsive programming for UUCP's young community members, four new programs were introduced in 2017-2018. Each was designed to meet a different developmental need: 6th Grade Scouts, 3-4-5 zUUm, Media Literacy January, and the Sanctuary Table. All 4 of these programs saw great success and the Children's Ministry Committee chose to institute all 4 in the curriculum long term.

In January of this year, leadership within Children's Ministry met to prepare for Coming of Age. Upon reviewing the curriculum, the team determined that the much beloved and very strong curriculum could be redesigned in such a way that would deepen the students' experience and increase exposure to the greater UUCP community. This shift also more fully embraces CoA as a family curriculum and provides mentors with

a greater support. Beyond curriculum review, the team decided to add a formalized parent committee, a mentor interest meeting, a formal mentor orientation, a family interest meeting (the May before CoA launches), and replace handouts with a 'zine generated by each student.

Staffing and usage of the nursery continued to fluctuate in the 2017-2018 church year. The room remain a very important resource, and a space for families who need a break from the sanctuary is highly valued. After visiting other congregations and churches, the Children's Ministry Team has decided to officially transition the space to a "Family Comfort Room." The room will be safe for infants, but made welcoming to anyone who may need a moment away from the sanctuary. Infant care will still be provided with that staff person being primarily stationed in Room 15 until requested in the Family Comfort Room. In response to the success and need for parent groups, the team has decided to create a formal structure for OWL families and CoA parents as well as explore the possibility of Community Night Programming specific to various parent identities.

What challenges did the group face in 2017-2018 and how did you overcome them?

As in past years, the number of children registered for programming at mid-year was drastically lower than the number of children who have attended and participated in programming. By year's end the Children's Ministry Team was able to complete registration for more than double the number who had filled out forms by mid-year. This means that the congregations' annual dashboard as reported in mid-year does not accurately represent the work and need of the Children's Ministry Team. Moreover, the data and statistics methods utilized for the past 6 years were not appropriate measurements for the population. Going forward, the Children's Ministry Team will shift measurements and database tracking methods to provide an easy and accurate picture.

Another challenge faced by the Children's Ministry Team was in regards to families from outside the congregation who attend curriculum specific programming. This is in part a result of expanded middle school programming and of an increase of children served overall. Throughout the year there were a number of incidents that illustrated the division between member (formal or informal) families and those from outside the congregation. While UUCP strives to be welcoming, it became very clear that time and careful consideration was needed to ensure that the community could function as a whole. Significant staff and committee time was spent processing and responding to conflicts, perceived inequities, and differing communication expectations. The Children's Ministry Team decided to collaborate with a few non-member families to create resources for orienting families to the great UUCP community. These include meetings, community night events and classes, and work with the minister. Implementation will being in August of 2018.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

- Rev. Margret A. O'Neill
- Emrys Staton
- Rose Pascoe
- Our Children's Ministry Families
- Our Students
- Our Dedicated teachers
- Bob Davis, Kristen Flangos, Janine Gelsinger, and the entire Kids Kamp Team
- Tiffany and Daniel Mendez
- Rosemary Wilson and the OWL parent group
- OWL Teachers: Ceyshé Napa, Sarah Montgomery, Laurie Arora, Kathleen Waldron, Jeff Newman, Sam Kirkland

- Grace Galiano, Christopher Mann, Jacob Barnum, Bella LaBlanc, Phoebe Dubisch and Mikall Forester for their help in organizing “The Heights.”
- Belinda Clark
- The UUCP Community for enthusiastically supporting Children’s Ministry

What does the group have planned for 2018-2019 and beyond?

To further expand the RE program and continue to improve the quality of education our students participate in. To this end, we plan to:

- Provide a successful well-grounded and community based Coming of Age year
- Explore the potential of annual OWL programming (as opposed to the current every other year cycle)
- Create community engagement opportunities via connections with liberal faith communities
- Continue to define and refine the vision and role of Kids Kamp in both the UUCP and Greater Phoenix Community
- Provide experimental programming during second service
- Further develop inclusive spaces in the sanctuary and on campus in general
- Create greater opportunities for community connection for parents

Community Night

Name of Group/Committee: Community Night - Welcoming Ministries

Name of Leader of Group/Committee: Janine Gelsinger - Membership and Welcoming Ministries Coordinator, Daisy Danforth - Spring Community Night Coordinator, Teri & Donna Talbot - Chef Coordinators, then Senior Chef Advisors

Members of Group/Committee: (No official committee - we are a Community Night team under the Welcoming Ministries umbrella). Membership and Welcoming Ministries Coordinator/Host - Janine Gelsinger, Spring Community Night Coordinator - Daisy Danforth (hired while Janine was on maternity leave), Chef Coordinators/Senior Chef Advisors - Teri and Donna Talbot, Chefs and Sous Chefs - Teri Talbot, Donna Talbot, Justin Gelsinger, Amanda Rogers, Robin Stewart, Linda Vance, Julie Talbot, Ruth Crowley, Marjorie Redleaf and Granger Macy, Emrys Staton, Patricia Gortari, Daisy Danforth, Justin Wescott, Carrie Lifshitz, Janine Gelsinger, Todd and Stephanie Haughton, Cherie Stafford, Joan Gale, Carol Manetta, Alisa Phillips, Vicki Meyers, EV Girod, Lynn MacVean

We had 12 first-time chefs or sous chefs join us this year! Welcome to Chefs Justin Wescott, Robin Stewart, Patricia Gortari, Todd and Stephanie Haughton. Carol Manetta and Carrie Lifshitz promoted from sous chef to chef. New sous chefs this year included Joan Gale, EV Girod, Vicki Myers, Alisa Phillips and Lynne MacVean. We increased the total number of chefs from 15 to 17, and sous shefs from 14 to 17.

We added the position of “Kitchen Coordinator” to assist the chefs with set-up and serving food and switched our Welcoming Ministries Coordinator over to “Hostess,” in order to facilitate connections in the Johnson Room.

See the full updated job descriptions for fall:
phoenixuu.org/jobinfo

Capital/Construction Committee

Purpose

The committee is responsible for researching and recommending a capital campaign plan, to include capital improvements and ministry investments with corresponding budgets that support the mission, vision, and strategic ends of the Unitarian Universalist Congregation of Phoenix. The entire project involved three phases - Planning - Fundraising - Construction. The committee began its work in Fall 2015; now in Spring 2018 we are at the end of planning process and near the end of fundraising. The committee intentionally reduced in size once fundraising was completed, and the focus turned to construction; the remaining members are Bunny Hodas, Dale Wiebusch, and Dale Fischer, along with Reverend Margret and Heidi Parmenter. Frank Schweiger is our volunteer owners' representative, and Richard "Duke" Plattner remains as chair.

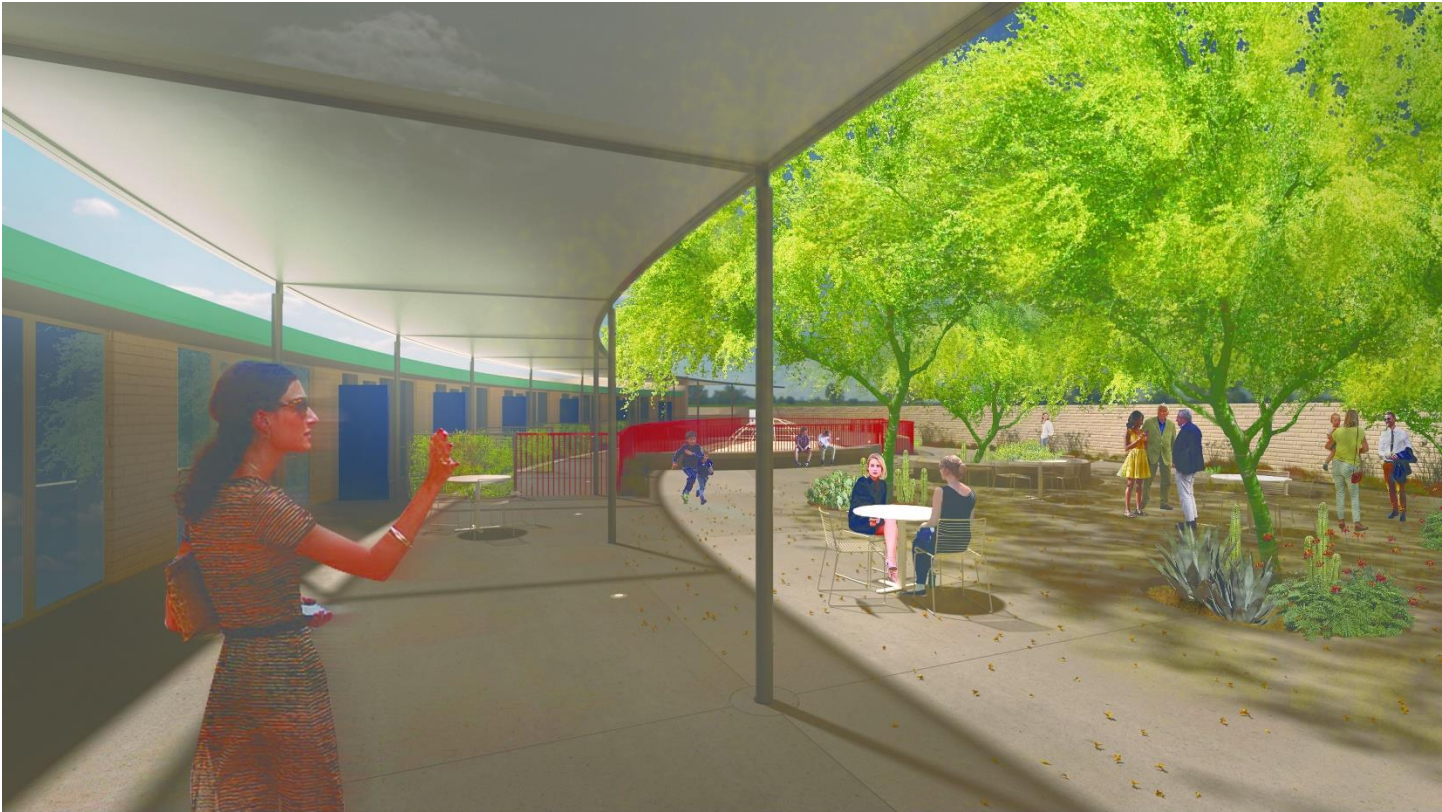
Please refer to the 2017 UUCP Capital Committee Annual Report to view the prior year's work and the scope of the building project. Since that report was completed we raised \$1,515,987.00 in Spring and Fall capital campaigns in addition to the annual Stewardship drive.

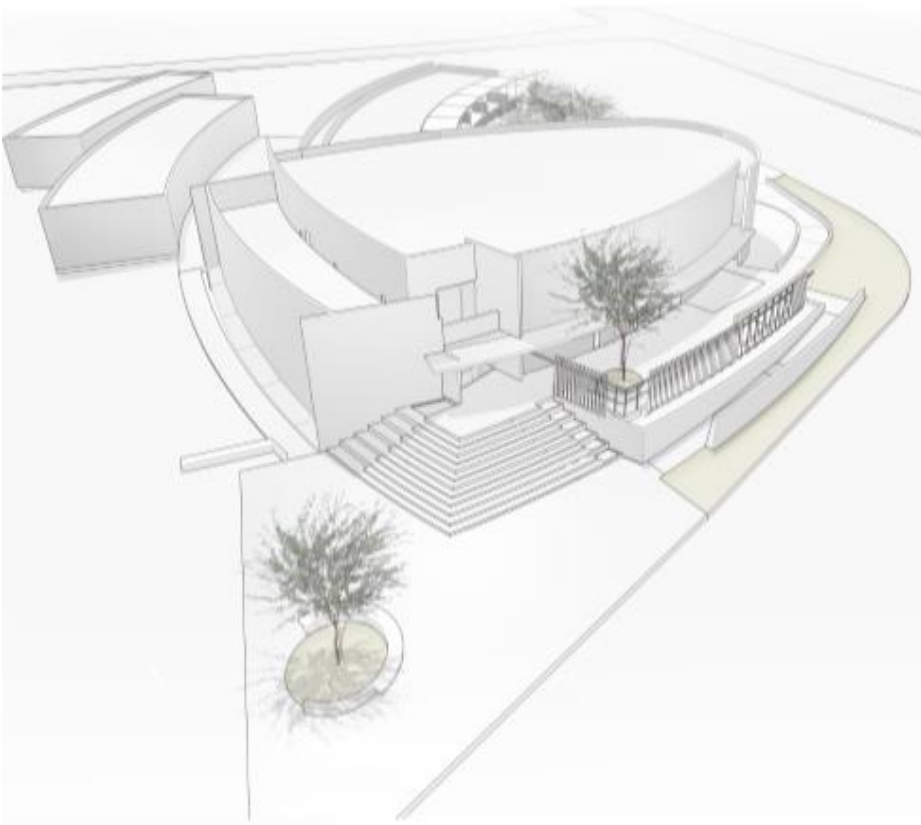
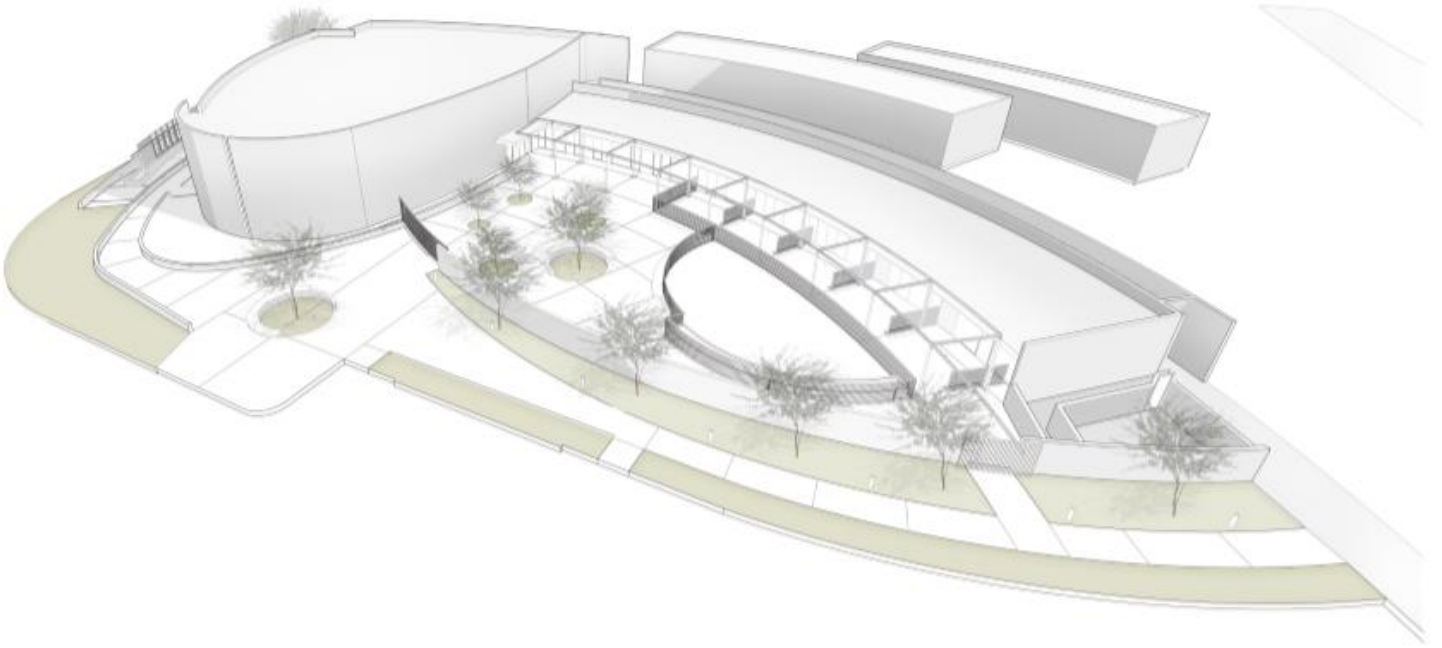
Last Fall we encountered a snag with TOPV because several deadlines in the Master Plan had expired. Town officials were concerned that we might be legally required to go through the zoning process all over again. The officials were rooting for us but had to red flag their concerns for higher level review. Our architect, Marlene Imirzian, ably assisted by congregation member Dale Wiebush, worked with TOPV legal staff and the mayor's office and successfully obtained town approval to proceed. A very happy outcome but months passed during the process.

Construction plans have been completed and submitted to the Town of Paradise Valley to approve and issue building permits. Then Murphy's Law jumped up and bit us again because TOPV changed its building code after our submittal but before we got approval. We are currently negotiating with the town so we don't have to redo all of the structural calculations.

Once approval is obtained, our general contractor will gather bids from subcontractors. The bids from subs will be open to our inspection. The general contractor is Robert R. Porter Construction, and Jason Porter is the project supervisor. Porter Construction, led by Jason Porter, did excellent work for UUCP nine years ago when the prior capital campaign enabled us to bring in new water and electrical service, change from septic tanks to city sewer, and build the bathroom core.

One area of concern is that construction costs have risen dramatically since the cost estimates were obtained last year, partly due to Trump tariffs and partly due to general economic conditions which include a construction boom in the Valley. Porter Construction and the architect are already actively looking for ways to reduce the project price, such as by reducing the hauling cost for the dirt to be removed in the parking lot project by dumping it in the southwest corner of the property instead of hauling it away. We remain cautiously optimistic we will be able to build the entire project.





Finance Committee

Name of Leader of Group/Committee:

Larry Reed

Members of Group/Committee:

Jim Allen, Diana Ashley, Eric Muehlstedt, Ted Myers

What were the group's goals for 2017-2018?

The committee examined the monthly financial reports and approved minor corrections made by the staff, updated the committee charter, reviewed preliminary budgets and began the search for a CPA firm to perform an audit of the annual financial report (in prior years the audits have been performed by a member of the congregation who is not a member of the committee and in accordance with UUA published guidelines).

Maryland School Task Force

Name of Leader of Group/Committee:

Cathy Kim

Members of Group/Committee:

Sue Baird, Christine Carmona, Ruth Crowley, Gary Ezzell, Grace Galliano, Marina Hoffman, Frances Howard, Cynthia Markey, Susan Morris, Joan Myer, Joan O'Connor, Jane Ramsberger, Joan Roberts, Victoria Snively, Linda Vance

Please list all special events/classes/workshops that your group held between July 2017 and June 2018, including date and number attending.

The Task Force did not meet on a regular basis. Planning for activities at Maryland took place primarily through email and phone calls.

What were the group's goals for 2017-2018?

During this second year of UUCP's participation in the Maryland School Partnership, along with Church of the Beatitudes and Beatitudes Campus, our goal has continued to be providing community support to the school staff in nurturing students and interacting with families. This is a Title I school serving a challenging population in a lower socio-economic neighborhood. During the year Maryland staff identifies a variety of needs which we then communicate to our members in hopes that they will respond to the opportunity to volunteer as tutors, mentors, help with special events, assist in the garden program, participate in teacher appreciation activities, work with refugees and their families, and donate supplies that have been requested.

What key decisions were made in 2017-2018?

Actions taken this year: 1. Because teachers highly value the assistance of volunteers in the classroom, we stepped up recruitment of tutors to work with individuals and small groups with the result that the partnership had twenty-seven amazingly wonderful, faithful folks this year building relationships with students, including refugees, and helping them with academics. We increased efforts to set expectations and encourage

communication between teachers and volunteers to maximize volunteer efforts. Volunteers have expressed how interesting and rewarding they have found this opportunity to be connected to students and the school.

2. Recruiting, training, and retaining teachers continues to be a challenge for all schools and particularly those that have a challenging demographic, such as Maryland. Building community is an important goal of the administration and one that the partnership works to support. The Campus provided a back-to-school lunch for staff in August, Beatitudes Campus residents, and the UUCP senior women's group twice this year wrote notes of encouragement and appreciation to staff members (about 100!), and in May a teacher appreciation luncheon was prepared and served by partnership volunteers and PTA moms all working together - all to let the staff know that we, as community members, know how hard they work and that we really appreciate them. During the teacher walk out partnership team members contributed gift cards to help out the classified school staff who did not get paid during that week. The staff has been very grateful for the care and generosity of the partnership.

3. As you know from recent teacher actions, school funding suffers in this state. School supplies, among other things, are inadequate, and last year again we asked for donations of classroom and hygiene supplies that teachers often end up buying themselves. In addition Maryland School has a significant refugee population that is food insecure, especially during vacation periods, and we asked for help in December for these families. Your generosity as a congregation was wonderful, and we thank you.

4. During the year we try to respond to needs expressed by Maryland staff and administration. Several individuals from our partnership group began an English class for adult family members of refugee students at Maryland. Individual and small group ministry donations have helped us to support the reading program with books, the After School Academy with incentive prizes, family events with snacks, and the quarterly student recognition awards with ice cream parties. The school does not have funds for these occasions; so your contributions mean a lot.

5. Our garden-orchard program is in its tenth year with about 200 first and fourth graders participating in classroom and hands on projects twice a month throughout the year. In addition to planting, nurturing and harvesting veggies, flowers, and fruit, we study life cycles and soil, compost, feed birds and track the weather. This year the National Wildlife Federation designated the garden as Certified Schoolyard Habitat. Next year with the help of Desert Botanical Garden we will complete installation of a butterfly-pollinator garden. In the past we have had some grants but need help to sustain this effort, including volunteers to work with small groups of students. They really love gardening, and it is an excellent way to connect them with the resources of this planet!

6. We continue to encourage Congregation members to contribute Arizona tax credit donations to Maryland School.

What challenges did the group face in 2017-2018 and how did you overcome them?

The needs of the students and staff continue to be more than we are able to respond to as we would hope. The way in which our schools are funded continues to be inadequate. In working with Maryland School, we are making an effort to give members of the congregation the opportunity to respond in a meaningful way as they can with time, talent and thought to how the situation can be changed.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

To each and every member, friend, family at UUCP who made a contribution to Maryland School – tutoring, volunteering at an event or in the garden, bringing supplies, incentives, gift cards, cash donations – a huge thank

you! This is all about making life better for those in our community who are struggling. Maryland School is definitely a better community because of your help.

Gratitude to Desert View Learning Center families for your participation in the holiday collection of books for the Literacy Center to send home with students who have very few at home.

This year the Advancing Justice Ministry has been very active in supporting our voice in the community, giving us information and the opportunity to write cards and letters to our governing representatives about the needs for education reforms. This aspect of our outreach to schools is very important. Special thanks to all the Team for your faith in this project and your commitment to being a part of it.

What does the group have planned for 2018-2019 and beyond?

We hope to make progress in recruiting volunteers for both the classroom and garden project. Every contact with a student can be a growth experience for them and a rewarding opportunity for a mentor to share gifts. We also would like to connect more community groups and businesses with the school. Participation in work days and family events is a chance for more people to make a difference in the education of young people. A significant aspect of what we do is to respond to needs that arise at the school during the year for volunteers, as well as supplies that are beyond the budget. We hope the congregation will continue your wonderful generosity. It is anticipated that the increased consciousness of need for educational reforms in this state will require us to be more active in learning about policy and candidates for office in this election year. Keep in touch with Advancing Justice for opportunities to be involved.

Membership Committee

Name of Group/Committee:

Membership Committee

Contact Email for Leader of Group/Committee:

janinegelsinger@phoenixUU.org

Name of Leader of Group/Committee:

Janine Gelsinger

Members of Group/Committee:

The members who have made Pathway to Membership part of their ministry this year include:

PTM Greeters/Check-in: Vicki Meyers, Arlene Kole Salmon

PTM Pillars of Membership Testimony: Vicki Meyers, Vince Waldron, Amy McKlinton, Carol Manetta, Dan Coleman

PTM Board Members/ Vision Statement presentation: Vince Waldron

Membership Office helper (prepared folders, name tags, etc.): Pat Reed

Membership Database helper: Don Weir

Membership Name Tags: Lydia Yanak

Please list all special events/classes/workshops that your group held between July 2017 and June 2018, including date and number attending Pathway to Membership:

Saturday, August 12, 2017, 9:00 AM-2:00 PM
10 prospective members attended (8 joined)

Thursdays, October 19 and 26, 2017, from 6:45-8:30 PM
10 prospective members attended (7 joined)

Saturday, January 13, 2018, 9:00 AM- 2:00 PM
9 prospective members attended (9 joined)

Thursdays, April 6 and 13, 2017, 6:45-8:30 PM
16 prospective members attended (14 joined)

Starting Point Tour:

Month	Attendance	Tour Guide(s)
July	12	Janine Gelsinger
August	23	Janine Gelsinger
September	9	Janine Gelsinger
October	3	Janine Gelsinger
November	4	Janine Gelsinger
December	7	Janine Gelsinger
January	12	Joan Gale and Vicki Myers
February	0	Joan Gale and Vicki Myers
March	16	Janine Gelsinger
April	3	Janine Gelsinger

What were the group's goals for 2016-2017?

Pathway to Membership Goals

- I. Pathway to Membership creates a welcoming space, in the spirit of Radical Inclusion:
 - a. Means
 - i. Times that classes are scheduled reflect diverse schedules and needs.
 - ii. Announcements regarding class registration reach all possible participants in different modalities (announcements in OOS, pulpit announcements, Compass, Horizons, Welcome Desk).
 - iii. Email communications are welcoming and inclusive (accommodating to schedules, no-pressure, timely responses).
 - iv. Greeters warmly welcome each participant.

- v. Membership Coordinator warmly welcomes each participant (recognition from tours, welcome desk, or at least emails).
- vi. Minister(s) warmly welcome each participant.
- vii. Physical space for class is accessible (sitting/standing/movement, back supports in chairs, use of mic/speakers, poster sizes, breaks provided, expressed needs are accommodated).
- viii. Physical space for class is welcoming (set-up is complete, signs clearly direct participants, name tags ready, sign in clipboard complete, food and beverages are inviting and inclusive of dietary needs).
- ix. Speaking space is made for different types of sharers during the group activities (reminders and acknowledgement of sharing types, timer for equal sharing time in groups).
- x. Member gifts express thanks, and UUCP “swag” promotes feeling of inclusion.

b. Measurements

- i. Attendance numbers
- ii. Participant Survey
- iii. Published Announcements
- iv. Membership coordinators assessment
- v. Minister’s assessment
- vi. Member feedback

II. Pathway to Membership builds connections, in the spirit of a Community for our Time, between participants and

- a. each other,
- b. existing members,
- c. the membership coordinator,
- d. minister(s),
- e. board/leadership,

f. Measurements:

- i. Attendance at reunion
- ii. Participant Survey
- iii. Anecdotal evidence of future interactions between Membership Coordinator, Ministers, Members, Board/Leaders, etc.

III. Pathway to Membership clearly presents the Pillars of Membership as expectations achievable for all who wish to commit to membership:

a. Means

- i. Folder/packets are provided to review either ahead of time or over the week between classes.
- ii. Pillars are clearly defined as expectations of membership in presentation.
- iii. Pillars personified by a diverse group of members (diversity in gender, age, length of membership, race, LGBTQ status, etc.)
- iv. Diverse means to fulfill the Pillars are presented through existing members experiences in Pillars presentation.
- v. Participants are able to clearly identify how they will fulfill their Pillars (Connecting with Congregation form, Pledge form, etc.)

- vi. No participant feels they are excluded from membership outside of their own choice (time, money, work/family commitments, etc.)
- vii. No participant feels pressure to join.

b. Measurements

- i. Number of completed pledge forms
- ii. Number of completed connecting with the congregation forms
- iii. Percent of new members that are connected after 6 months, 1 year, 5 years
- iv. Participant Survey
- v. Percentage of participants who join as members.

IV. Pathway to Membership reflects what it means to live out the vision:

- a. Spiritual Community for Our Time
Means: Top 10 Reasons activity
- b. Theologically Diverse
Means: Walkabout activity, Small Group Activity
- c. Radically Inclusive
Means: Small Group activity, Pillars presenters
- d. Justice Centered
Means: UUCP History Video, Minister's presentation of History
- e. Measurements
 - i. Participant Surveys
 - ii. Membership Coordinator Evaluation
 - iii. Minister(s) evaluation
 - iv. Member feedback

What key decisions were made in 2017-2018?

Pathway to Membership:

I spent much of my leave researching how other congregations facilitate Pathway to Membership or the equivalent from the other members of the UUAMP group. Eventually we decided on a “map” with different Paths to membership in the center which will both deepen the membership experience and make it more accessible. The first new member class in this new format will take place in August 2018. More in next year’s report!

Starting Point Tour: The new Inquirers series, which will be held each Sunday after service, is replacing the tour. More in next year’s report.

Spring Picnic: The Railroad Park cancelled our picnic for a park-wide event on our date (February 24). We weren’t able to find another open date in February or March that didn’t already have a scheduled congregation event.

What challenges did the group face in 2017-2018 and how did you overcome them?

Membership: Every membership class we have many more folks sign up than actually attend. Adding in several reminders seems to help but not totally eliminate this phenomenon.

Starting Point Tour: The Starting Point tour was successfully lay led in January and February while I was on leave by Joan Gale and Vicki Myers.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

Pathway to Membership: Vicki Myers, Arlene Kole Salmon, Vince Waldron, Amy McKlindon, Carol Manetta, Dan Coleman for their amazing support of PTM. Rev. Margret, Emrys Staton for their participation in PTM, and Geoff Anderla, Pat Reed, and Don Weir for their tireless support of membership!

Starting Point Tour: Thank you to Joan and Vicki!

What does the group have planned for 2018-2019 and beyond?

Pathway to Membership: Trying out the new Pathway format!

Starting Point Tour: Trying out the new Inquirers series!

Nominating Committee

Name of Group/Committee: Nominating Committee

Committee Chair: Jenny Jones

Committee Members: Bonnie White, Bill Snowden, Daisy Danforth, Lynn Raabe, Josh Tures

This year the Nominating Committee was charged with providing nominations for:

- 4 Board of Trustees members and leadership positions within the Board, including nominations for President and Vice President (co-presidents), Secretary, and Treasurer of the Board
- 2 UUCP Foundation Board members
- 4 Nominating Committee members

In addition, we assisted the Transition Committee by making callouts to the Congregation for nominee suggestions for the Ministerial Search Committee.

Nominating Committee also extended invitations and received acceptances from 2 YRUU members for representation on the Board of Trustees

The Committee's Charter, Timeline, and Job Descriptions were accepted 'as-is' from previous years. We made some minor revisions to the Job Descriptions, after the nominees were selected, correcting some grammatical errors and making the formatting more consistent throughout the documents. These changes were reviewed and approved by Nominating Committee and the UU Foundation. The Board of Trustees will be reviewing and possibly making their own revisions at a later date.

The Questionnaire Letters (to gather bio information from the Nominees) remained as is from the previous year. The Nominating Committee members held meetings and/or consulted with members of the Board of Trustees, the UU Foundation Board, and UUCP Staff, to obtain their suggestions and insights as to the "ideal" nominee characteristics and skills for all positions. As required by the UUCP bylaws, we publicized in February the positions that were to be filled. We were successful in recruiting a well-qualified and enthusiastic nominee for each open position.

This year's recruitment of Nominees and our ability to publish the roster of Nominees by April 1, as required by the By-laws, was hampered by the Election for a Ministerial Search Committee. We received a waiver from the Board due to possible confusion among the Congregation and uncertainty as to who would be elected to the Ministerial Search Committee on April 8, 2018.

The election resulted in an additional Nominating Committee seat needing to be filled. In addition, a last minute resignation by an existing Board of Trustees member made it necessary to continue recruiting Nominees into the week after the Ministerial Search Committee election on April 8, 2018. We were able to publish the complete roster of Leadership Nominees, with biographical sketches and photos via mass email to the Congregation on April 17, 2018. We will be publishing again in the Horizons (monthly newsletter) on May 1 and June 1.

Special thanks to the following individuals:

- Bonnie White, Nominating Committee member, who did a superb job of administering our documents, and keeping our constantly evolving list of nominees up to date. As the nomination process went on, she documented relevant information on future availability and interest that will be valuable for future Nominating Committees
- Vince Waldron, Board of Trustees President, who always made himself available to provide support in recruiting Board Nominees
- Geoff Anderla, Office Assistant, who worked closely with us in collecting bios and pictures of the leadership nominees for publication after the deadline at the earliest possible date



Nominating Committee

Program Council

Chair: Kim St. Clair

Members of Group/Committee: Leaders of congregational committees and activities groups.

Please list all special events that your group held between July 2017 and June 2018:

The Program Council met:

- Saturday, September 23, 2017, 9:00 AM-12:00 PM
- Saturday, April 7, 2017, 9:00 AM-12:00 PM
- Approximately 20 people at each meeting

What were the group's goals for 2017-2018?

Lead the congregation through the first year of ministerial transition.

What key decisions were made in 2017-2018?

Begin a Leadership Development program.

What challenges did the group face in 2017-2018 and how did you overcome them?

Scheduling. We figured it out!

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

All of the UUCP staff, including Rev. Margret for her wise shepherding during the transition, and Geoff, Heidi, Janine, Benjie and Katie for their amazing participation in every meeting.

What does the group have planned for 2018-2019 and beyond?

Continue to provide leadership to the congregation.

Refugee Assistance Partnership

Name of Leader of Group/Committee: Libby Walker

Members of Group/Committee: Julie Smart, Ellie Anderla, Linda Vance, Victoria Snively, Judy Lambert, Bobbi McGinn, Kat Dickson, Mary Eisenberg, Beth Graham, Anne Ezzell, Gary Ezzell

Please list all special events that your group held between July 2017 and June 2018:

Holiday Gift Collection December 2017, 50 members of the congregation. Tirhas' Team luncheon, September 2018, 5 team members, Tirhas and her son and a member of the Eritrean community.

What were the group's goals for 2017-2018?

To provide support and encouragement to two single Eritrean mothers and their children, two teams led by Libby Walker and Bobbi McGinn continued to work with Tirhas and Nebiat.

What key decisions were made in 2017-2018?

Libby Walker has stepped down as leader of the group. The teams will continue to interact with the two families, but we have decided not to renew our charter. So far no one of the current members is able to assume leadership.

What challenges did the group face in 2017-2018 and how did you overcome them?

One of our refugees needed more help than we could provide so we went back to the IRC where she was welcomed into their Intensive Case Management Program. The IRC will work with her for a year to set goals and identify both strengths and barriers, and we will continue to provide moral support.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

Special thanks to Gary and Anne Ezzell for inviting Nebiat's children to ride horses.

What does the group have planned for 2018-2019 and beyond?

Team leaders Libby Walker and Bobbi McGinn and their teams will stay in contact with the two Eritrean families as they become more self-sufficient. We do not plan to take on any more refugees.

Sanctuary Art Team

Name of Leader of Group/Committee: William Snowden

Members of Group/Committee: Ann Bixel was leader until she became ill in December 2017 and I was asked to take over. William Snowden with help from Joan Gale, Sam Kirkland, Ed Cernek, Robert Back, Laurel Hardin, Lillian Barker, Ann Bixel, Sarah Carlson, Diane Mote.

Please list all special events that your group held between July 2017 and June 2018:

We produced the following art displays in the Sanctuary: September – November, UUCP Members and Friends Artists; November – December, Seasonal decor by Sanctuary Art Team; January - mid March, Diversified Artist Collective – AZ; March – May, Artists from the Artery arranged by Laurel Hardin; May – August, Children's Art display set up by Diane Mote

What were the group's goals for 2017-2018?

To encourage and support the expression and creativity of artwork as an enriching part of the life and goals of the UUCP community.

What key decisions were made in 2017-2018?

Ann Bixel decided that she could not continue the chairperson position due to health reasons, and Rev. Margret asked William Snowden to take over at Ann's recommendation.

What challenges did the group face in 2017-2018 and how did you overcome them?

The DAC-AZ was not ready for the Martin Luther King service and William Snowden called a few of their members and encouraged them to bring in some appropriate pieces which they did. The music group planning and executing the Cabaret removed some of the DAC-AZ pieces from the side walls without the Sanctuary Committee's knowledge, a practice never done in UUCP in the past. Nothing was damaged; and the Committee was asked to put the art back in place, but the lack of respect for the artists was glaring. Art owned by UUCP and stored in the second floor storage area has been moved around to different locations without the Sanctuary Committee's knowledge. It is not known if any damage has occurred as inventory has not been taken.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

Laurel Hardin stepped up at my request and arranged for the Artery to setup the current exhibit.

What does the group have planned for 2018-2019 and beyond?

In addition to a Members and Friends show and a display by DAC-AZ, the committee is planning on a recycle art display and a fiber arts display.

Share the Plate Committee

Name of Leader of Group/Committee: Bonnie White

Members of Group/Committee: Cherie Stafford, Pauline Peverly, Julie Smart, Jim Sorgatz, Stephanie Haughton

What were the group's goals for 2017-2018?

The primary goal was to grow the committee to 6 members, each serving a two-year term. Three members starting in 2016 to retire in 2018, leaving the 2017 three to be the senior members on the committee that is to find three new members. This rotation is now well established. The committee is strong and vibrant and well positioned to continue to be so.

What key decisions were made in 2017-2018?

A system was put in place to allow Share the Plate to be working 6 months into the future. Our recurring organizations -- UUJAZ, UUSC -- are being assigned a permanent month on the calendar to allow for proper planning for that event. Share the Plate is behind the UUA matching funds opportunity by scheduling 2 regular Share the Plate Sundays over the next twelve months.

What challenges did the group face in 2017-2018 and how did you overcome them?

Share the Plate is still looking for ways to get members of the congregation involved in suggesting organizations that are important to them. We have used articles in Horizons and Compass to get the word out, but we are looking for more ways to encourage people to put forward their ideas.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

I want to thank all of the committee members for their dedication to the important task of finding, vetting, and presenting the great organizations that we have put forward this year. Cherie, Pauline, Julie, Jim, and Stephanie have all done their part to get this important work accomplished efficiently and with terrific communication and follow through. It is a pleasure working with each one of them.

What does the group have planned for 2018-2019 and beyond?

Continuing the process of rotation that we have set in place, choosing both new and historical organizations, watching for opportunities to reach out to the congregation for their input -- all are important to the continuing success of the Share the Plate mission.

Small Group Ministry

Name of Leader of Group/Committee: Rev. Margret A. O'Neill & Emrys Staton

Members of Group/Committee:

Small Group Facilitators 2017-18: Ruth Braunstein

Coordinator Beatitudes: Ellie Anderla, Ellie Murphy

Friendship Village: Libby Walker

Drop-in: Joan O'Connor

80's Babies: Sarah Moore and Amy McKlindon

Men's Group: Michel Gareau, Emrys Staton

Senior Women's Group: Peggy Paden, Jane Roosen, Val Wylie

Parents With Young(er) Children: Jonny Lifshitz, Sarah Montgomery.

North Scottsdale/ Fountain Hills: John Wilber

Second Wednesday Group: Anne Lackey

Sunday Night Pot-Luck Group: Lynn Raabe, Bunny Hodas.

Third Thursday: Jake Danforth

Please list all special events that your group held between July 2017 and June 2018:

The various Small Groups meet on their own schedules, monthly or bi-weekly, some meet year-round, others do not meet in the summer. Facilitators meet as a group once a month, and facilitator training workshops were provided in December 2017.

What were the group's goals for 2017-2018?

The goal was to expand the number and type of groups to meet the needs and preferences of congregational members and to continue to support the skills and commitment of facilitators.

What key decisions were made in 2017-2018?

Rev. Margret began to participate in Facilitators meetings during the year, preparing to take the staff support role for this program beginning in spring 2018.

What challenges did the group face in 2017-2018 and how did you overcome them?

Maintaining an effective Small Group program requires ongoing recruitment and training of facilitators and participants since people's lives and commitments change over time.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

Many thanks to the facilitators and to Ruth Braunstein and Emrys Staton for coordinating and leading the program over the past year.

What does the group have planned for 2018-2019 and beyond?

Small Group registrations through Realm will open in the early fall, and we will be seeking additional group facilitators to sustain and expand the program.

Stewardship Team

The members of this year's Stewardship Team and their roles are as follows:

- Gary Ezzell (theme and content)
- Vince Waldron (theme and content)
- Glen Lockwood (theme and content)
- Smoot Carl-Mitchell (connector orientation)
- Ruth Braunstein (connector recruitment and assignment)
- Bonnie White (connector assignment)
- Bunny Hodas (connector recruitment)
- Diana Ashley (events)
- Joan Gale (events)
- Ellie Murphy, Jan Wise, Libby Walker (group site organizers/hosts)
- Kinnie McEvoy (graphic design)



The theme “Living into Our Promise” was set this year by Glen Lockwood, Vince Waldron, Gary Ezzell and Rev. Margret. That team also prepared the text for the Stewardship Campaign brochure.

Thirty-five members (listed below) agreed to be Connectors, participated in Connector Orientation, and made personal contact with a total of 148 member households.

Mary Dawes	Dick Schaffer	Karin Quinn	Carolyn Allenby
Val Wylie	Susan Morris	Richard Plattner	Robert Back
Jan Wise	Vince Waldron	Joan Gale	Donna Featherston
Gary Ezzell	Sarah Moore	Ceyshé Napa	Tony Banegas
Cherie Stafford	Beth Graham	Bonnie White	Ed Cernek

Debbie Gordon
Ruth Braunstein
Sandy Weir

Lydia Yanak
Larry Reed
Mary and John Wilber

Jim Allen
Linda Vance
Judith Breuer

Joan O'Connor & Eric Muehlstedt
Dan Coleman
Ann Jackel

Sponsored Activities:

Leadership Recognition Event hosted by Susan Morris and Richard Plattner on Sunday, March 25, 2018. There were 35 members in attendance; Russ Braman provided music; Joan Gale and Diana Ashley provided refreshments.

Three Connector Orientation sessions were held:

Friday, 3/23/18 1 pm – 3 pm

Thursday, 3/29/18 7 pm – 9 pm

Friday, 3/30/18 11 am – 1 pm

Kick-Off Sunday was held on April 1, 2018 and the Congregational Photo was taken on this day by Emrys Staton. The Stewardship Campaign officially closed on Sunday, May 6.



Overall Summary

As of the end of May 2018 we have received a total of 266 pledges of which 28 are financial hardship waivers. The total amount pledged is \$522,744.

- Thirty-nine percent (or 104 households) of the pledging households increased their pledges from 2017-18 representing a total increase of \$32,487
- Fourteen percent (or 37 households) of the pledging households decreased their pledges from 2017-18 representing a decrease of \$29,787
- Thirty-three percent (or 89 households) of the pledging households kept their pledges the same for 2018-19 representing \$232,667

There are 48 member households that have not renewed their current year pledges and an additional 35 households who did not pledge for the current fiscal year or for next year. The members who have not responded to the last two campaigns will be receiving an inactivation letter in July. All of the member households who have not pledged for next year have been contacted via email, mail and phone. Many of the families are experiencing times of uncertainty and are waiting to pledge later.

For this current fiscal year of 2017-2018, we have 287 active pledges totaling \$571,195. There is a \$40,000 projected decrease in pledge income from this year to next. Most of this change is due to the economic challenges hitting our community. Of the 22 members we lost this past year, 36% (or 8 individuals) moved out of the state; another 36% (or 8 individuals) have chosen to go to another church; and 27% (or 6 individuals) have given no reason for leaving. These 22 individuals represent approximately \$13,000 in lost pledges. The majority of the decrease in pledge income from this year to next is from decreased pledges, request for financial hardship and increased economic diversity among our members.

UMON New Day Center

Name of Leader of Group/Committee: Rene Apack

Members of Group/Committee: Lots of different volunteers.

Please list all special events that your group held between July 2017 and June 2018:

Once a month - First Sundays

What were the group's goals for 2017-2018?

Help once a month on First Sundays to help serve meals.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

Dave Rosetti, Donna Alga, Joan Myer, Julianna Delgado, Kelley McCarthy, Leslie Stallcop, Maddy Laferla Jenni, Melinda McClement, Paisley Rossetti, Phil Slater, Rosemary Wilson, William Mee, Cherie Stafford, Betsy Bradley.

Unicare

Name of Leader of Group/Committee: Victoria Myers

Members of Group/Committee:

Ellie Anderla, Memorial Services Coordinator

Diana Ashley, Friendship Partners Coordinator

Vicki Myers, Unicare Coordinator and the volunteer teams who support these programs so they can exist for the benefit of our community.

Please list all special events that your group held between July 2017 and June 2018:

Unicare Volunteer Recognition Breakfast March 17, 2018. Memorial Services volunteers supported 20 services from July 17, 2017 to February 2018.

What were the group's goals for 2017-2018?

To provide a seamless transition and continued support as our lead minister left UUCP, and we welcomed the interim. To grow our volunteer base where needed.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

The Unicare Programs would not exist without the loving support of our volunteers: the Unicare e-group, Memorial Services and Friendship Partners. They supported 20 memorial services, shared their time and love with Friends, and lifted up those in our community during times of celebration and sorrow through their generosity, kind words, caring hands and open hearts. Thank you to all our volunteers.

What does the group have planned for 2018-2019 and beyond?

Development of a lay pastoral care program. Training and group ministry for those caring for others (caregivers). Possible use of new Realm website for Unicare directory.

Worship Associates

Much like so many service teams at UUCP, the Worship Associates have been navigating the waters of transition since the departure of Rev. Susan Frederick-Gray in June of 2017. We welcomed new leadership this year from our Interim Minister Rev. Margret O'Neill, who has crafted a new order of service for us to work with and opened up the Worship Associate role to more direct involvement in UUCP's Sunday worship services.

The Worship Associate team meets bi-monthly with Rev. Margret to discuss our experiences and feedback from our Sunday services. We review our scripts and performances at those services in a mutually supportive environment. We take to heart the feedback we hear from UUCP members, friends, and guests and incorporate changes as needed to help make our services more effective and spiritually relevant.

Rev. Margret has stressed our involvement as welcoming members of the congregation, speaking directly to congregants not as clergy but as fellow members. Our welcoming introductions at the beginning of each service

now incorporate our personal experiences that relate to the theme for that day. These sometimes vulnerable moments have brought our own common humanity into focus and helped us all connect in a more intimate way with those in attendance on Sunday mornings.

Worship Associates now present announcements prior to the offering as a part of the transition from the meditation time into the delivery of the sermon. We're continuing to work out effective ways to communicate from the pulpit what's happening at UUCP. We now also formally extinguish the chalice at the end of service.

In a service community such as ours, transitions usually mean saying hello to new team members and goodbye to those who have fulfilled their service. We had significant turnover this year due to several Worship Associate terms expiring. We say a heartfelt thank you to Donna Featherston, Francis Wiget, Kim St. Clair, Melissa Schwartz, and Heidi Singer (our former lead WA), all of whom served this congregation with love and dedication for their past terms of service. They will be missed.

On a note of renewal, we welcomed Amy McKlindon and Katherine Harris as new Worship Associates and, in late-breaking news, have recently added both Tammy Wheeler and Sam Kirkland to the Worship Associate team. Ellie Anderla and Eric Muehlstedt will continue to serve out their terms in the coming year.

The Worship Associates extend their thanks to Rev. Margret for her guidance, to the congregation for its support of our presence, and best wishes to all the other teams that make up this wonderful spiritual community. We look forward to continuing our service to UUCP in the coming year.

Members of Group/Committee: Ellie Anderla, Katie Harris, Sam Kirkland, Amy McKlindon, Eric Muehlstedt, Tammy Wheeler

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

Special thanks to Donna Featherston, Melissa Schwartz, Heidi Singer, Kim St. Clair and Francis Wiget, members of the UUCP Worship Team who helped get our year off to a solid start and then moved on to other arenas of involvement.

What does the group have planned for 2018-2019 and beyond?

Anyone interested in serving as a Worship Associate is welcome to contact Rev. Margret to learn more about the expectations and joys of this important role.

Sponsored Group Reports

Open Arts and Crafts Studio

Name of Leader of Group/Committee: Jay Alagia

Members of Group/Committee: Cynthia Girard, Val Wylie, Mark Stambaugh, Laurel Hardin, Nina Shah, Joan Myer, Pamela Kielbowicz, Debbie Gordon, Barbara Danielson, Janet Gordon

What challenges did the group face in 2017-2018 and how did you overcome them?

Promoted membership by offering teaching.

What were the group's goals for 2017-2018?

We wanted more members to join us.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

We thank the UUCP administration for helping us when we needed it. We also thank Manuel and Belinda for setting up tables.

What does the group have planned for 2018-2019 and beyond?

We hope to expand our teaching.

Outdoor Group

Name of Leader of Group/Committee: Bonnie White

Members of Group/Committee: Julie and Marshal Smart, Cherie Stafford, Ed Cernek, Phil Slater, Dan Hunn, Jenny Jones, Stephanie and Todd Haughton, Laurel Hardin and Mark Stambaugh, Gary Ezzell, Lynda Dean, Beth Graham, Caroli Peterson, Glen and Leslie Stallcop, Sylvia Tucker

Please list all special events/classes/workshops that your group held between July 2017 and June 2018.

The Outdoor Group cancelled the hike planned for March 24 and marched instead with the kids in March for Our Lives. Many of our group participated in supporting this important movement; however, the crowd was so large it was impossible to get either a headcount of our group or who the participants were -- and that's okay!

What were the group's goals for 2017-2018?

The Outdoor Group is always aspiring to attract new hikers into our number. We did, in fact, have an excellent turnout for the fall hiking campout in Flagstaff, the planning meeting in November had 30 people attending! And we have had good attendance at all other events. The group is attempting to make more strenuous hikes available for those folks wanting more exercise while offering an easier hike, when possible, for people interested in a less strenuous pace.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

A huge thank you goes to our hike leaders, Laurel and Mark Hardin, Julie and Marshal Smart, Phil Slater, Stephanie and Todd Haughton, Gary Ezzell, Jenny Jones Moats. Without a hike leader coming up with the idea of where to hike, doing the pre-hike, sending the details about the hike, this group would not function!

What does the group have planned for 2018-2019 and beyond?

The campout is such a great coming together into community around the campfire. Having a season opener and a season finale campout is definitely part of the plan going forward. It has even been suggested to have a midwinter campout closer in to the valley. We have been getting together after the hikes to share a meal before going about the rest of our Saturday. All of these activities have the benefit of bringing our hikers closer together in community.

Poetry Coffeehouse

Name of Leader of Group/Committee: Tish Gauntt

Saturday Meditation Group

Name of Leader of Group/Committee: Jay Alagia

Members of Group/Committee: Bill Snowden, Mark Stambaugh, Dale Fisher, Mike Peterson, Mike Sheffer, Robert Baltes, Sue Kennedy, Mary Dokes, Donna Featherston, Pamela Kielbowicz

Please list all special events/classes/workshops that your group held between July 2016 and June 2017, including date and number attending.

1. Meditation in Japanese Garden
2. Meditation and potluck in memorial garden
3. Drumming circle and meditation
4. Singing of hymns and meditation
5. Birthday celebrations

What were the group's goals for 2016-2017?

Better meditation and inner peace.

What key decisions were made in 2016-2017?

Limit the group size to 12 members.

What does the group have planned for 2017-2018 and beyond?

Continue in the manners of the recent past.

Traveling Second Fridays

Name of Leader of Group/Committee: Barbara Cawthorne

Members of Group/Committee: There are usually 35-50 attending the Traveling 2nd Friday presentation.

Please list all special events/classes/workshops that your group held between July 2017 and June 2018.

We meet the 2nd Friday of every month January through May.

What were the group's goals for 2017-2018?

The goals are to provide an enjoyable and informative program, lasting for around an hour, of a trip the presenter has experienced.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

I wish to thank those presenting a travel show in 2018: Joan Gale and Bill Snowden, Todd and Stephanie Haughton, Bill and Joy Mee, Harriet Williams, Claude Guldner. Also thank you to Lynne Raabe for filling in while I was on vacation, Geoff Anderla for placing our promotions in Compass and the Sunday bulletin, Elyse Arring for placing our information in Horizons. Smoot Carl-Mitchell and Dick Fisher for helping with the new technology of the slide projector, and lastly the guests who come to our presentations which make it all worthwhile.

What does the group have planned for 2018-2019 and beyond?

We have the same format, but we will have different presenters.

Walking Poetry Lovers

Name of Leader of Group/Committee: Jay Alagia

Members of Group/Committee: Judy Curtis, Mike Peterson, Mike Sheffer, Robert Baltes, Cynthia Girard, Bill Snowden, Jerry O'Neal, Marina Hoffman, Joan Myer, Barbara Danielson, David Wood, Debbie Gordon, Pamela Kielbowicz, Suman Dev

What were the group's goals for 2017-2018?

Continue to enjoy walking, fellowship and poetry

What key decisions were made in 2017-2018?

We added an option breakfast after the walk, and we advertised the event as a meetup group to adjust in retirement.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

We would like to thank the organizers of meetup.com

What does the group have planned for 2018-2019 and beyond?

Keep on enjoying breakfast after the walk at Brown Bag

Women's Ritual

Name of Leader of Group/Committee: Pat Reed

Members of Group/Committee: This is an open/Drop-in group

Please list all special events/classes/workshops that your group held between July 2017 and June 2018

Third Thursday of every month except July 2017.

What were the group's goals for 2017-2018?

Get others to lead ritual. We had one additional person step up besides the 4 original leaders.

What key decisions were made in 2017-2018?

Remain a women's only group at least for the time being.

Please list any people whom you would like to thank for their contributions to your group in 2017-2018.

Donna Talbot, Brenda Nelson, Sierra Rose Christine Carmona for leading ritual.

What does the group have planned for 2018-2019 and beyond?

Having ritual every month. Encourage more people to lead. Eventually have intergenerational ritual for solstice.

Affiliate Reports***UU Foundation Report*****Name:**

Unitarian Universalist Foundation of Phoenix (UUFPP)

Contact Email for Leader of Group/ Committee:

uufp@phoenixuu.org

Members:

Diana Ashley, President
 Don Weir, Treasurer
 Terry Lockwood, Secretary
 Robert Back
 Jan Kaplan
 Jan Wise

Special events held between July 2017- June 2018:

Held a Chalice Keeper Reception on Sunday, January 7, 2018, at home of Jan Kaplan and Helen Walker with 25 people in attendance. We introduced the UUA's "Wake Now Our Vision (WNOV) Campaign," followed by a series of Sunday education sessions and newsletter articles about this great opportunity. Individuals who are considering putting UUCP/UUFPP or any UUA entity (UUA, UUSC, et. al.) into their will, please contact us at uufp@phoenixuu.org. And if you already have the above in your will and/or are considering make a change, contact us! There is a wonderful opportunity for matching grants.

“Gratitudes” and Accomplishments for 2017-2018:

- We are so appreciative of those who have listed UUCP/UUFPP in their wills or estate plans. Our “Chalice Keepers” are listed below. We began a monthly article in “Horizons” to keep members apprised of UUFPP and the joy and comfort that comes from not only having a will and estate plan, but one that bequeaths to Unitarian Universalism and the way we want our world to be. Understanding of UUFPP, and the fact that all UUCP members are automatically members of UUFPP, has been added to the Pathway to Membership class

- **WNOV Campaign.** We will continue to communicate the UUA’s “Wake Now Our Vision Campaign”, which provides a matching grant to those who add UUCP/ UUFP or a UUA entity to their wills from January 1, 2017 – June 20, 2020. This is an amazing opportunity for “free money”. In all of our busy lives, it’s difficult to think ahead to tomorrow, much less about perpetuating the spiritual and social justice values we want to create in the world beyond our lifetimes. This is an opportunity to multiply the monetary and intrinsic value of your estate planning. Thanks to Jan Kaplan and Diana Ashley for taking the lead on this initiative
- **Flaskered Estate.** Robert Back has continued to lead us in resolving the Flaskered Estate. This was a bequest of land to UUCP/ UUFP in 1986, as described in previous Annual Reports, by Mr. Raymond Flaskered. Given the extensive time since Mr. Flaskered’s death, the complexity of his will, the lack of cooperation from heirs, and records lost, the Foundation Board has continued to work with outside tax attorneys, real estate specialists, and the AZ Attorney General’s Tax Department to resolve the issue with many dedicated hours of legal work by Robert. Our continued goal (and hopeful fruition in 2018-2019) is for UUCP to be provided clear title to this land and subsequent sale
- **Tucker Estate.** Terry Lockwood led investigation into potential sale of the Tucker property, a 60 acre unimproved parcel in Apache County, Arizona, which was bequeathed to UUFP some years ago. Having visited the property, Terry confirmed that it is very remote and still has no improved access. UUFP has contacted the 8 adjacent property owners to see if they have interest in purchasing the Tucker property. We will continue to follow-up with potential buyers in the coming year
- **Policies and Procedures.** Don Weir initiated a number of improvements in our financial/ fiduciary operating policies and procedures. We have clarified the process of annual distributions from UUFP to UUCP. A minimum interest bearing money market checking account was converted to a collateral sweep (cash) account, allowing for greater flexibility to reinvest funds as favorable investment opportunities arise as well as maintaining a baseline amount of cash to pay immediate invoices of UUCP as needed. Accounting and bookkeeping practices were updated
- **Capital Campaign Contribution.** UUFP approved a lead contribution of \$75,000 to the Phase II Capital Campaign, increasing the total pledged contribution to \$275,000. The Board provided two payments to the Capital Campaign Fund this year. The UUFP released the UUCP line of credit obligation of \$45,000 and made the first year payment of \$80,000. The remaining UUFP obligation to the Capital Campaign is \$150,000
- **Fund Financial Performance.** The investment of funds for the UUFP is managed by Mutual of Omaha Wealth Management. 2017 was a good year for the UUFP with the fund balance increasing from \$1,071,383.11 to \$1,169,899.38. This increase was made possible due to a substantial gift from the Lucienne Rosconi estate and a favorable investment market. UUFP provided \$53,715 for 2016-17 fiscal year general UUCP Support in April 2017 and \$51,320 in March 2018 for 2017-18 fiscal year General UUCP Support

The UUFP Board would like to thank the UUCP Chalice Keepers listed below. If you would like to be listed as a Chalice Keeper, please let the Office or UUFP Board know that you have included UUFP/UUCP in your estate plans.

Patrick Allsman, Ellie Anderla, Geoff Anderla, Diana Ashley, Janice Brunson, Smoot & Charlotte Carl-Mitchell, Lynn A. Ellsworth, Gary Ezzell, Dale Fisher, Tish Gauntt, Susan & Richard Goldsmith, Lynne Haeseler, Gene Harvey, Bunny Hodas, Richard & Connie Jahrmarkt, Jan Kaplan & Helen Walker, George & Shirley Karas, Glen Lockwood & Terry Lockwood, Dot Manser, Bill Mee, Jon (Randy) Miller, Ellie Murphy, Shirley Odegaard, William Parker & Betty Saylor, Heidi Parmenter, Pauline Peverly, Richard Plattner & Susan Morris, Pat Reed, Laida Restrepo, Gene Rowley & Audrey Mawson, Arlene Salmon, Donna Seward, Marshall

& Julie Smart, Kim St. Clair, Margaret Stallworthy, Jill Story, Arnold Thaw, Libby Walker, Elaine Warner, Sandy & Don Weir, Kathryn (Kay) Welch, Harriet Williams and Janet Wise

We keep those Chalice Keepers who have passed this year in our loving memories:
Sandra Schaffer

UUFP Financial Reports

Unitarian Universalist Foundation of Phoenix Statement of Financial Position As of January 31, 2018

	<u>Jan 31, 18</u>
ASSETS	
Current Assets	
Checking/Savings	
MOO Investment Account	1194041.12
Total Checking/Savings	<u>1194041.12</u>
Total Current Assets	<u>1194041.12</u>
TOTAL ASSETS	<u>1194041.12</u>
LIABILITIES & EQUITY	
Equity	
Flower Fund	229.17
General Legacy Fund	1158058.28
Memorial Garden Fund	35,753.67
Total Equity	<u>1194041.12</u>
TOTAL LIABILITIES & EQUITY	<u>1194041.12</u>

Unitarian Universalist Foundation of Phoenix
Statement of Income and Expense
January 2018

	Jan 18
Ordinary Income/Expense	
Income	
Investment Gain/Loss	24,682.09
Total Income	24,682.09
Gross Profit	24,682.09
Expense	
Professional Fees	189.00
Special Events and Evangelism	351.35
Total Expense	540.35
Net Ordinary Income	24,141.74
Other Income/Expense	
Other Expense	
Equity Account Allocation	24,141.74
Total Other Expense	24,141.74
Net Other Income	-24,141.74
Net Income	0.00

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06/22/18
Cash Basis

Unitarian Universalist Congregation of Phoenix
Final Balance Sheet
As of May 31, 2018

	May 31, 18
ASSETS	
Current Assets	
Checking/Savings	
1030 · Mutual of Omaha - Ckng 3697	549,179.19
1070 · Pay Pal Account	-84.48
1080 · Change Fund	50.00
Total Checking/Savings	549,144.71
Other Current Assets	
1580 · Savings-Short Term Investments	
1583 · Ameritrade	313,458.22
Total 1580 · Savings-Short Term Investm...	313,458.22
Total Other Current Assets	313,458.22
Total Current Assets	862,602.93
Fixed Assets	
1300 · Building Improvements	911,991.81
Total Fixed Assets	911,991.81
TOTAL ASSETS	1,774,594.74
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
2100 · Payroll Liabilities	
2110 · Net Paychecks	-631.88
2111 · Flexible Spending Program	1,313.28
Total 2100 · Payroll Liabilities	681.40
2310 · Prepaid Pledge Contributions	32,800.17
2571 · Pending Stock Donations	5,980.11
Total Other Current Liabilities	39,461.68
Total Current Liabilities	39,461.68
Long Term Liabilities	
2400 · Mortgage	
2401 · Mortgage	614,686.59
Total 2400 · Mortgage	614,686.59
Total Long Term Liabilities	614,686.59
Total Liabilities	654,148.27
Equity	
3010 · Unrestrict (retained earnings)	230,561.61
3111 · Capital Building Fund Account	823,631.10
3112 · Maintenance Reserve Fund	58,341.00
3113 · Mini Capital (Sound Equipment)	2,630.05
3114 · AZIM	2,248.40
3185 · Memorial Garden	8,589.48
3190 · Ministerial Innovation Fund	1,770.50
Net Income	-7,325.67
Total Equity	1,120,446.47
TOTAL LIABILITIES & EQUITY	1,774,594.74

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Cash Basis

Unitarian Universalist Congregation of Phoenix
Final Profit & Loss by Class
July 2017 through May 2018

Ordinary Income/Expense	<u>AZIM</u>	<u>Capital</u>	<u>Congregation</u>	<u>Kids Kamp</u>	<u>TOTAL</u>
Income					
4010 · Annual Pledges	0.00	719,907.36	494,924.05	0.00	1,214,831.41
4012 · Mid Year Pledges	0.00	0.00	12,152.00	0.00	12,152.00
4013 · One Time Gifts	0.00	0.00	6,190.00	0.00	6,190.00
4015 · UU Foundation Support	0.00	0.00	51,320.00	0.00	51,320.00
4020 · Special Service Contributions	0.00	0.00	15,453.41	0.00	15,453.41
4050 · Fundraising					
4051 · Auction	0.00	4,108.00	0.00	0.00	4,108.00
4052 · Cabaret	0.00	0.00	4,425.00	0.00	4,425.00
4053 · Other Fundraising	0.00	0.00	2,024.00	0.00	2,024.00
Total 4050 · Fundraising	0.00	4,108.00	6,449.00	0.00	10,557.00
4090 · Other Contributions	0.00	17,650.22	33,567.37	0.00	51,217.59
4225 · Minister's Discretionary Fund	0.00	0.00	3,407.65	0.00	3,407.65
4230 · Debt Service Contribution	0.00	52,250.00	0.00	0.00	52,250.00
4300 · Ministry & Stewardship					
4315 · Music & Choir	0.00	0.00	42.00	0.00	42.00
4320 · Adult Religious Ministry	0.00	0.00	950.00	0.00	950.00
4325 · Children's Religious Ministry	0.00	0.00	2,039.00	0.00	2,039.00
4330 · 7th & 8th Grade Programs	0.00	0.00	210.00	0.00	210.00
4335 · Young Religious UU - teens	0.00	0.00	45.00	0.00	45.00
4350 · Endowment Fund	0.00	0.00	90.00	0.00	90.00
4370 · Memorial Garden	0.00	0.00	2,980.00	0.00	2,980.00
4395 · Community Nights	0.00	0.00	2,015.43	0.00	2,015.43
4400 · DACA Scholarship Donations	24,555.34	0.00	0.00	0.00	24,555.34
Total 4300 · Ministry & Stewardship	24,555.34	0.00	8,371.43	0.00	32,926.77
4800 · Congregation Sponsored Groups					
4890 · Maryland School Partnership	0.00	0.00	1,210.00	0.00	1,210.00
Total 4800 · Congregation Sponsored Groups	0.00	0.00	1,210.00	0.00	1,210.00
5 · Earned revenues					
5010 · Commissions	0.00	0.00	369.97	0.00	369.97
5310 · Interest-savings/short-term inv	0.00	-17.00	220.25	0.00	203.25
5320 · Dividends & interest-securities	0.00	-21.19	-17.00	0.00	-38.19
Total 5 · Earned revenues	0.00	-38.19	573.22	0.00	535.03
5020 · Use of Facilities					
5021 · General Use of Facilities	0.00	0.00	2,345.00	0.00	2,345.00
5022 · DVLC Facilities Use	0.00	0.00	41,904.00	0.00	41,904.00
5025 · EEC Facility Use	0.00	0.00	27,500.00	0.00	27,500.00
Total 5020 · Use of Facilities	0.00	0.00	71,749.00	0.00	71,749.00
5100 · Kids Kamp					
5110 · Registration Deposit	0.00	0.00	0.00	10,270.00	10,270.00
5120 · Tuition Only	0.00	0.00	0.00	4,355.00	4,355.00
5130 · Tuition & Aftercare	0.00	0.00	0.00	4,965.00	4,965.00
5140 · Discounts	0.00	0.00	0.00	-75.00	-75.00
5170 · Single Week Campers	0.00	0.00	0.00	250.00	250.00
5180 · Scholarship Donations	0.00	0.00	0.00	115.00	115.00
5100 · Kids Kamp - Other	0.00	0.00	0.00	0.00	0.00
Total 5100 · Kids Kamp	0.00	0.00	0.00	19,880.00	19,880.00
6910 · Restricted Funds Transfers					
6911 · Capital Fund	0.00	-676,559.15	0.00	0.00	-676,559.15
6912 · Maintenance Reserve	0.00	11,762.00	0.00	0.00	11,762.00
6925 · AZIM	3,989.68	0.00	0.00	0.00	3,989.68
6990 · Ministerial Innovation Fund	0.00	0.00	129.50	0.00	129.50
Total 6910 · Restricted Funds Transfers	3,989.68	-664,797.15	129.50	0.00	-660,677.97
Total Income	28,545.02	129,080.24	705,496.63	19,880.00	883,001.89

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Cash Basis

Unitarian Universalist Congregation of Phoenix
Final Profit & Loss by Class
July 2017 through May 2018

	<u>AZIM</u>	<u>Capital</u>	<u>Congregation</u>	<u>Kids Kamp</u>	<u>TOTAL</u>
Gross Profit	28,545.02	129,080.24	705,496.63	19,880.00	883,001.89
Expense					
1660 · Construction					
1662 · Permits and Fees	0.00	9,858.03	0.00	0.00	9,858.03
1666 · Professional Fees	0.00	74,307.17	0.00	0.00	74,307.17
1668 · Miscellaneous Expenses	0.00	175.00	0.00	0.00	175.00
1680 · Interior Renovations	0.00	175.00	0.00	0.00	175.00
Total 1660 · Construction	<u>0.00</u>	<u>84,515.20</u>	<u>0.00</u>	<u>0.00</u>	<u>84,515.20</u>
7100 · Minister's Package					
7110 · Minister Salary	0.00	0.00	60,583.40	0.00	60,583.40
7120 · Minister Housing Allowance	0.00	0.00	18,000.00	0.00	18,000.00
7130 · Pension - Minister	0.00	0.00	8,624.97	0.00	8,624.97
7140 · Minister Benefits	0.00	0.00	5,903.63	0.00	5,903.63
7145 · Minister Benefits-LTD	0.00	0.00	188.60	0.00	188.60
7150 · Minister PE Allowance	0.00	0.00	5,521.08	0.00	5,521.08
7160 · Minister's In-Lieu FICA & MCare	0.00	0.00	6,011.60	0.00	6,011.60
7180 · Search/Relocation Expenses	0.00	0.00	6,293.92	0.00	6,293.92
Total 7100 · Minister's Package	<u>0.00</u>	<u>0.00</u>	<u>111,127.20</u>	<u>0.00</u>	<u>111,127.20</u>
7200 · Staff Salaries & Related					
7210 · Salaries & wages - staff	0.00	0.00	267,659.49	0.00	267,659.49
7230 · Pension plan contr - Staff	0.00	0.00	21,754.38	0.00	21,754.38
7240 · Employee benefits - not pension	0.00	0.00	38,899.01	0.00	38,899.01
7250 · Payroll taxes	0.00	0.00	21,505.58	0.00	21,505.58
7260 · Workers Comp Insurance	0.00	0.00	2,602.00	0.00	2,602.00
7270 · Flexible Spending Act Admin	0.00	0.00	1,000.00	0.00	1,000.00
Total 7200 · Staff Salaries & Related	<u>0.00</u>	<u>0.00</u>	<u>353,420.46</u>	<u>0.00</u>	<u>353,420.46</u>
7500 · Other personnel expenses					
7520 · Accounting fees	47.25	488.25	13,894.25	669.38	15,099.13
7530 · Legal fees	0.00	0.00	10.00	0.00	10.00
7550 · Contract Services					
7551 · Contract Services - Music	0.00	0.00	10,030.00	0.00	10,030.00
7550 · Contract Services - Other	0.00	275.00	4,609.33	0.00	4,884.33
Total 7550 · Contract Services	<u>0.00</u>	<u>275.00</u>	<u>14,639.33</u>	<u>0.00</u>	<u>14,914.33</u>
7560 · Staff Development-RE	0.00	0.00	1,600.12	0.00	1,600.12
7561 · Staff Development-Music	0.00	0.00	2,183.40	0.00	2,183.40
7563 · Staff Development-Admin	0.00	0.00	1,642.28	0.00	1,642.28
7565 · Staff Development-Just/Pastor	0.00	0.00	2,006.63	0.00	2,006.63
7566 · Staff Development-Member Coord	0.00	0.00	66.45	0.00	66.45
7570 · Payroll Processing	0.00	0.00	1,971.99	0.00	1,971.99
Total 7500 · Other personnel expenses	<u>47.25</u>	<u>763.25</u>	<u>38,014.45</u>	<u>669.38</u>	<u>39,494.33</u>
7900 · Financing Expense					
7910 · Mortgage Principle Expense	0.00	29,386.92	0.00	0.00	29,386.92
7920 · Interest Expense	0.00	26,840.58	0.00	0.00	26,840.58
Total 7900 · Financing Expense	<u>0.00</u>	<u>56,227.50</u>	<u>0.00</u>	<u>0.00</u>	<u>56,227.50</u>
8100 · Non-personnel expenses					
8110 · Supplies	0.00	0.00	5,076.89	0.00	5,076.89
8130 · Telephone & telecommunications	0.00	0.00	4,165.16	0.00	4,165.16
8140 · Postage, shipping, delivery	0.00	0.00	2,705.69	0.00	2,705.69
8150 · Computer & Software	0.00	143.83	5,732.68	0.00	5,876.51
8160 · Equip rental & maintenance	0.00	0.00	5,682.26	0.00	5,682.26
8180 · Books, subscriptions, reference	0.00	0.00	106.87	0.00	106.87
8190 · Bank Charges & Fees	0.00	0.00	3,530.96	533.30	4,064.26
Total 8100 · Non-personnel expenses	<u>0.00</u>	<u>143.83</u>	<u>27,000.51</u>	<u>533.30</u>	<u>27,677.64</u>
8200 · Furn, Fixt & Equipt					
8210 · Sound Equipment	0.00	0.00	177.15	0.00	177.15

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Cash Basis

Unitarian Universalist Congregation of Phoenix
Final Profit & Loss by Class
July 2017 through May 2018

	<u>AZIM</u>	<u>Capital</u>	<u>Congregation</u>	<u>Kids Kamp</u>	<u>TOTAL</u>
Total 8200 · Furn, Fixt & Equipt	0.00	0.00	177.15	0.00	177.15
8250 · Fundraising Expenses					
8251 · Auction	0.00	314.28	0.00	0.00	314.28
8252 · Caberet	0.00	0.00	2,223.65	0.00	2,223.65
8250 · Fundraising Expenses - Other	0.00	1,291.84	402.00	0.00	1,693.84
Total 8250 · Fundraising Expenses	0.00	1,606.12	2,625.65	0.00	4,231.77
8500 · Misc expenses					
8530 · Mem dues/Accreditation Renewal	0.00	0.00	36,475.04	0.00	36,475.04
Total 8500 · Misc expenses	0.00	0.00	36,475.04	0.00	36,475.04
8600 · Occupancy expenses					
8620 · Utilities	0.00	0.00	31,777.50	0.00	31,777.50
8640 · Insurance Property & Liab	0.00	0.00	7,316.00	0.00	7,316.00
8650 · Debit Service-Mortgage interest	0.00	0.00	52,250.00	0.00	52,250.00
Total 8600 · Occupancy expenses	0.00	0.00	91,343.50	0.00	91,343.50
8700 · Building and Grounds					
8710 · Grounds Maintenance	0.00	2,016.61	12,688.71	0.00	14,705.32
8720 · Custodial & Kitchen					
8721 · Coffee Hour Supplies	0.00	0.00	2,281.34	0.00	2,281.34
8722 · Janitorial	0.00	0.00	1,788.44	0.00	1,788.44
Total 8720 · Custodial & Kitchen	0.00	0.00	4,069.78	0.00	4,069.78
8730 · Building Service/Repairs					
8731 · Bldg Service/Repair Labor	0.00	0.00	2,432.50	0.00	2,432.50
8730 · Building Service/Repairs - Other	0.00	1,432.65	49,251.48	0.00	50,684.13
Total 8730 · Building Service/Repairs	0.00	1,432.65	51,683.98	0.00	53,116.63
8740 · Interior Renovations					
8743 · Equipment	0.00	0.00	17,433.96	0.00	17,433.96
8746 · Construction	0.00	11,762.00	0.00	0.00	11,762.00
Total 8740 · Interior Renovations	0.00	11,762.00	17,433.96	0.00	29,195.96
Total 8700 · Building and Grounds	0.00	15,211.26	85,876.43	0.00	101,087.69
8800 · Ministry and Stewardship					
8811 · Brochures	0.00	0.00	316.00	0.00	316.00
8812 · Worship Expense	0.00	0.00	459.51	0.00	459.51
8813 · Minister's Discretionary Fund	0.00	0.00	4,773.91	0.00	4,773.91
8814 · Minister's Innovative Fund	0.00	0.00	129.50	0.00	129.50
8815 · Music & Choir	0.00	0.00	2,245.67	0.00	2,245.67
8820 · Adult Religious Ministry	0.00	0.00	419.72	0.00	419.72
8825 · Children's Religious Ministry	0.00	0.00	4,311.24	0.00	4,311.24
8830 · 7th & 8th Grade Programs	0.00	0.00	141.67	0.00	141.67
8833 · Our Whole Lives (OWL)	0.00	0.00	10.00	0.00	10.00
8835 · YRUU	0.00	0.00	89.20	0.00	89.20
8845 · Community Outreach	528.49	0.00	16,229.68	0.00	16,758.17
8850 · Publicity	0.00	0.00	2,191.16	0.00	2,191.16
8855 · Newcomer and Membership	0.00	0.00	173.00	0.00	173.00
8857 · Community Nights	0.00	0.00	2,423.20	0.00	2,423.20
8860 · Unicare	0.00	0.00	100.40	0.00	100.40
8865 · Stewardship	0.00	0.00	100.00	0.00	100.00
8872 · Lay Leadership Development	0.00	0.00	1,173.92	0.00	1,173.92
8885 · Memorial Garden	0.00	0.00	4,923.30	0.00	4,923.30
8898 · DACA Scholarship Expense	24,516.12	0.00	0.00	0.00	24,516.12
Total 8800 · Ministry and Stewardship	25,044.61	0.00	40,211.08	0.00	65,255.69
8900 · Church Sponsored Groups					
8910 · Justice Ministries	703.16	0.00	520.44	0.00	1,223.60
8913 · New Day Center	0.00	0.00	1,500.00	0.00	1,500.00
8930 · Maryland School Project	0.00	0.00	1,165.52	0.00	1,165.52
Total 8900 · Church Sponsored Groups	703.16	0.00	3,185.96	0.00	3,889.12

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Unitarian Universalist Congregation of Phoenix
Final Profit & Loss by Class
July 2017 through May 2018

	<u>AZIM</u>	<u>Capital</u>	<u>Congregation</u>	<u>Kids Kamp</u>	<u>TOTAL</u>
Total Expense	<u>25,795.02</u>	<u>158,467.16</u>	<u>789,457.43</u>	<u>1,202.68</u>	<u>974,922.29</u>
Net Ordinary Income	2,750.00	-29,386.92	-83,960.80	18,677.32	-91,920.40
Other Income/Expense					
Other Income					
6800 · Mortgage Principle					
6810 · Capital Fund Portion	0.00	10,600.20	0.00	0.00	10,600.20
6820 · Congregation Portion	0.00	18,786.72	0.00	0.00	18,786.72
Total 6800 · Mortgage Principle	<u>0.00</u>	<u>29,386.92</u>	<u>0.00</u>	<u>0.00</u>	<u>29,386.92</u>
9750 · Foundation Expense Reimbursemen	0.00	0.00	9,435.00	0.00	9,435.00
9760 · Capital Seed Fund	0.00	0.00	45,833.00	0.00	45,833.00
Total Other Income	<u>0.00</u>	<u>29,386.92</u>	<u>55,268.00</u>	<u>0.00</u>	<u>84,654.92</u>
Other Expense					
9930 · Program admin allocations					
9932 · AZIM	2,750.00	0.00	-2,750.00	0.00	0.00
Total 9930 · Program admin allocations	<u>2,750.00</u>	<u>0.00</u>	<u>-2,750.00</u>	<u>0.00</u>	<u>0.00</u>
Total Other Expense	<u>2,750.00</u>	<u>0.00</u>	<u>-2,750.00</u>	<u>0.00</u>	<u>0.00</u>
Net Other Income	<u>-2,750.00</u>	<u>29,386.92</u>	<u>58,018.00</u>	<u>0.00</u>	<u>84,654.92</u>
Net Income	<u><u>0.00</u></u>	<u><u>0.00</u></u>	<u><u>-25,942.80</u></u>	<u><u>18,677.32</u></u>	<u><u>-7,265.48</u></u>

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Cash Basis

**Unitarian Universalist Congregation of Phoenix
Final Capital Profit & Loss**

May 2018

	May 18	Budget	% of Budget	Jul '17 - May 18	YTD Budget	% of Budget	Annual Budget
Ordinary Income/Expense							
Income							
4010 · Annual Pledges	5,105.15			719,907.36			
4050 · Fundraising							
4051 · Auction	75.00			4,108.00			
Total 4050 · Fundraising	75.00			4,108.00			
4090 · Other Contributions	200.00			17,650.22			
4230 · Debt Service Contribution	4,750.00			52,250.00	0.00	100.0%	0.00
5 · Earned revenues							
5310 · Interest-savings/short-term inv	0.00			-17.00			
5320 · Dividends & Interest-securities	0.00			-21.19			
Total 5 · Earned revenues	0.00			-38.19			
6910 · Restricted Funds Transfers							
6911 · Capital Fund	3,187.46			-676,559.15	0.00	100.0%	0.00
6912 · Maintenance Reserve	0.00			11,762.00			
Total 6910 · Restricted Funds Transfers	3,187.46			-664,797.15	0.00	100.0%	0.00
Total Income	13,317.61			129,080.24	0.00	100.0%	0.00
Gross Profit	13,317.61			129,080.24	0.00	100.0%	0.00
Expense							
1660 · Construction							
1662 · Permits and Fees	0.00			9,858.03			
1666 · Professional Fees	13,250.39			74,307.17			
1668 · Miscellaneous Expenses	0.00			175.00			
1680 · Interior Renovations	0.00			175.00			
Total 1660 · Construction	13,250.39			84,515.20			
7500 · Other personnel expenses							
7520 · Accounting fees	31.50			488.25			
7550 · Contract Services	0.00			275.00			
Total 7500 · Other personnel expenses	31.50			763.25			
7900 · Financing Expense							
7910 · Mortgage Principle Expense	0.00			29,386.92	0.00	100.0%	0.00
7920 · Interest Expense	0.00			26,840.58	0.00	100.0%	0.00
Total 7900 · Financing Expense	0.00			56,227.50	0.00	100.0%	0.00
8100 · Non-personnel expenses							
8150 · Computer & Software	0.00			143.83			
Total 8100 · Non-personnel expenses	0.00			143.83			
8250 · Fundraising Expenses							
8251 · Auction	0.00			314.28			
8250 · Fundraising Expenses - Other	0.00			1,291.84			
Total 8250 · Fundraising Expenses	0.00			1,606.12			
8700 · Building and Grounds							
8710 · Grounds Maintenance	0.00			2,016.61			
8730 · Building Service/Repairs	0.00			1,432.65			
8740 · Interior Renovations							
8746 · Construction	0.00			11,762.00			
Total 8740 · Interior Renovations	0.00			11,762.00			
Total 8700 · Building and Grounds	0.00			15,211.26			
Total Expense	13,281.89			158,467.16	0.00	100.0%	0.00
Net Ordinary Income	35.72			-29,386.92	0.00	100.0%	0.00
Other Income/Expense							
Other Income							
6800 · Mortgage Principle							
6810 · Capital Fund Portion	0.00			10,600.20	0.00	100.0%	0.00
6820 · Congregation Portion	0.00			18,786.72	0.00	100.0%	0.00
Total 6800 · Mortgage Principle	0.00			29,386.92	0.00	100.0%	0.00
Total Other Income	0.00			29,386.92	0.00	100.0%	0.00

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**Unitarian Universalist Congregation of Phoenix
Final Capital Profit & Loss**

Cash Basis

May 2018

	May 18	Budget	% of Budget	Jul '17 - May 18	YTD Budget	% of Budget	Annual Budget
Net Other Income	0.00			29,386.92	0.00	100.0%	0.00
Net Income	35.72			0.00	0.00	0.0%	0.00



UUCP STRATEGIC IMPLEMENTATION PLAN: 2017-2018 FINAL REPORT

Submitted by Interim Lead Minister

Margret A. O’Neill

July 31, 2018

Executive Summary

This report provides the final summary data and measures on the progress against the UUCP Strategic Implementation Plan for the planning period that began in 2012, and ended with the 2017-18 year. It is presented in three sections, one section for each of UUCP Board's 2012-2018 Strategic Ends. Within each End is the interpretation from the initial Strategic Plan, a summary of the initial 5 Year Strategic Outcomes. Next, each implementation goal for the year is listed with data summarizing the progress on that goal. The goals for this year anticipated the possible ministerial transition, and focused on processes and measurements to create a base for the future. At the end of each section, the 5-year strategic target measures are compared to where we are after this year. This is the fifth and final year of reporting against these Strategic Ends.

Within: This continues to be the most focused End with the clearest measures, which is helpful in achieving our targets and annual implementation goals. We achieved 100% of the goals we set out to achieve and we are largely approaching our targets except in membership retention. Our 5 year new member retention goal is 45%. Twenty-five percent of members who joined in 2012-2013 were still present and pledged in 2017-18. The 2011-2012 cohort consistently tracked lower than other years, and the numbers began to rise with the group who joined the following year. New-member retention has been rising across the years, and with strengthened process for member engagement and connection, retention will likely continue to improve.

Participation in Sunday services is holding relatively constant across recent years, and there is an increase in Children's Ministry participation. Fewer people participated in the survey this year, so measures from that data source may not reflect the experience of the congregation as a whole. Indicators from the survey measuring the impact the ministry has in people's lives and their families are fairly constant, and generally positive. This congregation serves a much wider population than is reflected by membership numbers, with an all-ages participating community of nearly 1,000 people. Serving a large and diverse congregation with a static base of pledging members may pose a challenge in coming years.

Among: This Strategic End covers a range from Stewardship to Property Management, Children's Ministry to Multiculturalism, to sharing UUCP's ministry with the outside world. This diversity is reflected in the slightly higher number of annual goals. We fully achieved 8 of the 10 goals in this area. The Capital Campaign planning and fundraising continued into this year, but construction was not initiated due to delays in design and permitting. Participation in Children's Ministry continues to increase, and programs in that area continue to deepen and expand. There was a strong increase in financial giving to support the 2017-18 operational year, and the capital construction, but there was a

(perhaps corresponding) fall-off in pledging this spring to support the following year's operations. Interestingly, given the congregation's commitment to supporting multicultural competency, the survey results did not reflect any increase in perceived effectiveness of these efforts. There is still much room for sustained effort in this area.

Beyond: These goals were among the most ambitious, and not surprisingly, proved to be the most challenging to meet, even with dedicated staff in place to support social justice initiatives. The work continues in partnerships and support for the immigrant rights work in Arizona, along with other emerging initiatives such as women's equality, violence reduction, and equity in education.

In general, articulating and measuring specific strategic goals can lead to the development and implementation of more focused program initiatives. At the same time, objectives need to be measurable or observable; programs need to be targeted in such a way that there is a logical link between exposure and effect; and tools such as a well maintained member/participant database can be used to support measurement.

Having entered this system near the end of a strategic implementation cycle, it is my hope that over the coming year the new staff and team work plans will be logically linked to strategic objectives, that the measurements will be scientifically coherent and well integrated with program implementation, and that the progress reporting will be organically integrated with the usual course of business to support congregational life.

Within: Members see UUCP as the foundation for their personal and spiritual development and practice.

UUCP is a central part of the lives of UUCP members and families. It provides many opportunities for people and families to develop and share their personal and spiritual growth.

Mission Area: Grow in spirit, share journeys

Five-Year Strategic Outcomes

When people grow personally and spiritually through their participation in UUCP, the outcome will be a healthier community where people genuinely care and support one another, where people are encouraged to healthier habits and relationships and where we foster interpersonal dynamics based on listening and understanding, which support healthy responses to difference and conflict. Small Groups (e.g., choir, Small Group Ministry (SGM), meditation classes) are the primary way people develop relationships in the community and the key place where people receive care and ministry from the community.

Key to achieving these outcomes is offering small groups, worship, and programming that give UUCP community members of all ages the resources of connection, care, and listening, as well as practices and resources to grow personally and spiritually. These outcomes can be measured by the level of participation in the small groups of the congregation (including groups like meditation classes, choir, small group ministry, and Adult Faith Development (AFD) classes). High participation and strong membership retention would reflect that we are offering programs and opportunities that are meeting people's personal and spiritual needs. Now, at the end of the five years of this strategic plan, by measuring participation, we can evaluate the effectiveness of the strategies and programs intended to meet those needs.

SPECIFIC FIVE-YEAR TARGETS (2012 – 2017, revised for 2017-18 program year):

- A. Participation in ministries beyond Sunday morning is 120% of members
- B. Membership retention after 5 years is 45% (retention of new members)
- C. Determine baseline of overall annual membership retention
- D. Percentage of members who attend UUCP once a week 65%
- E. Annual increase in positive indicators of impact the ministry is having on people's personal and spiritual lives as individuals and families

Within: Members see UUCP as the foundation for their personal and spiritual development and practice.

Summary: This area of ministry proceeded well in the transitional time, and improved measurement processes were strengthened with the expanded use of database functions in summer 2017. Staff members continue to explore and expand the use of database capabilities so we can expect continued improvement in measurement and applications of database information to strengthen participant connection. We shifted to the Realm database in the early spring 2018, which improved access, tracking and connection for groups and teams of the congregation. A Measurement Task Force will begin work in the coming year to strengthen the calculation and focus of metrics; we kept the existing metrics in place through this year to generate comparable numbers across time (though some numbers in the old system are not comparable due to aberrations in counting in some years).

Sunday worship attendance held relatively steady in this congregational year. We have maintained much of the 2016-7 “Trump bump” although attendance on some dates (like 2016 post-election and Christmas Eve attendance, and the October 2017 white supremacy service) stand out as outliers compared to other years. Improved structures and pathways into membership and engagement paid off in the emergence of stronger congregational leadership and team participation (for example, in Usher/Greeter, Community Night Cook and Children’s Ministry teams). Expansion in Small Group Ministry opportunities, along with monthly theme coordination, created a sense of coherence across areas of congregational life. Adult Faith Development opportunities expanded, with substantially more offerings in the second half of the year.

Overall we experienced 100% achievement of goals in this area.

Within 1. (Target B) Establish and measure outcomes for individuals completing the pathway to membership class.

Completed: 100%

Outcome measures are in place and are being tracked.

Within 2. (Target B) Continue practice of three times a year (September, December, May), having staff review new members, noting where they are on the membership pathway – and then follow up. Add a yearly review of all not-currently-engaged members by staff.

Completed: 100%

The process is in place, and is being implemented on schedule

Within 3. (Target A, B) Begin to measure the percentage of new members who are engaging beyond Sunday morning compared to the interests they indicated on their membership engagement survey.

Completed: 100%

The process is in place, and is being implemented on schedule

Within 4. (Target A). Review and expand what is measured as engagement beyond Sunday morning, including justice ministries and children’s ministries not on Sunday. Review how we are counting for Unicare participation (caring actions). Make sure we are capturing all of our programs.

Completed: 100%

The process is in place, and is being implemented on schedule

Within 5. (Target D. E). Establish and measure goals for Community Night

Completed: 100%

The process is in place, and is being implemented on schedule

Within 6. (Target E). Increase the capacity of Unicare ministry including the services and resources offered and the number of connections to members made.

Completed: 100%

The process is in place, and is being implemented on schedule

Within 7. (Target E). Review and take intentional actions to expand small group ministry participation. Continue to discuss and brainstorm as staff and Small Group Ministry leaders to develop strategies.

Completed: 100%

New groups were added this year, facilitator training was provided and there was an expansion of group opportunities.

Within 8. (Target E) Explore ways to increase the number of members who have a regular spiritual practice and implement strategies

Completed: 100%

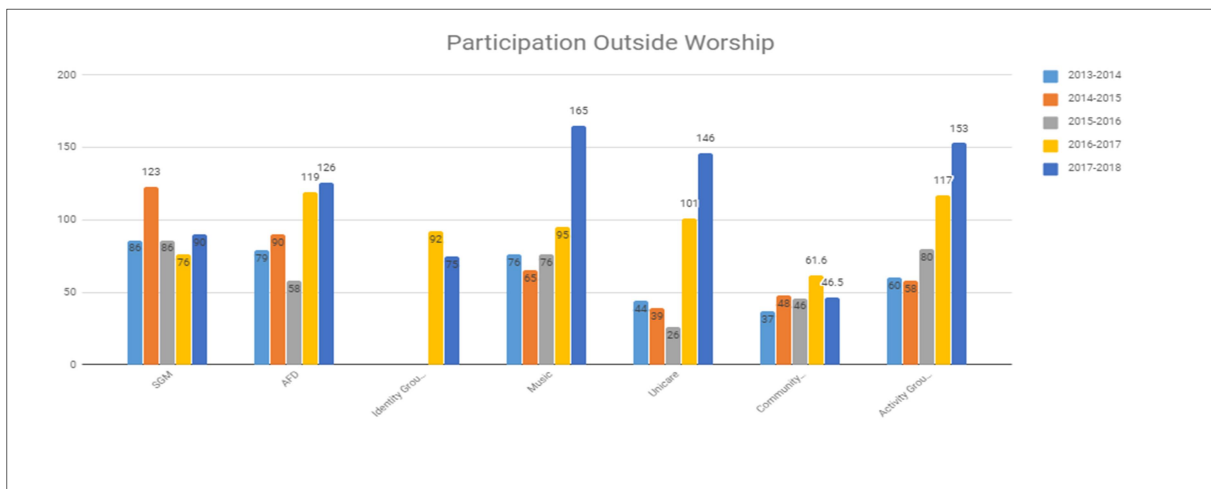
One program was added this year, and other opportunities for expansion were explored.

UUCP STRATEGIC IMPLEMENTATION PLAN: 2017-2018 PROGRESS REPORT

Small Group Ministries, Adult Faith Development, Music and Unicare are tracked via rosters and require ongoing commitment. We are able to track how many members are participating in these programs.

Identity Groups, Activity Groups and Community Night participation is tracked by number of attendees per event/meeting and can have different people each time. It is not possible to track how many unique members are participating in these programs.

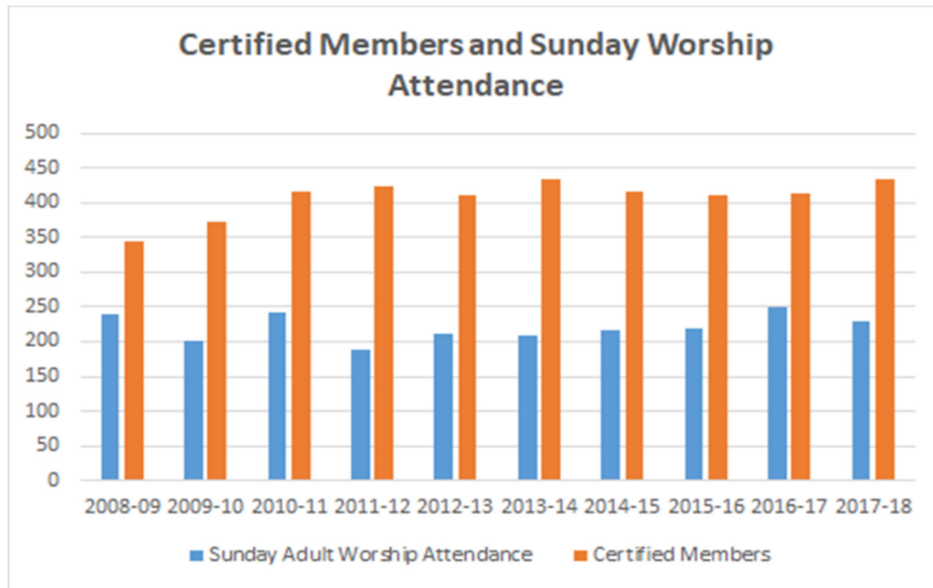
The total number of participants in programs outside of worship and Sunday Children's Ministry classes in 2017-2018 was 699. This figure includes non-members and double counting, so the percentage of membership is not a highly reliable measure.



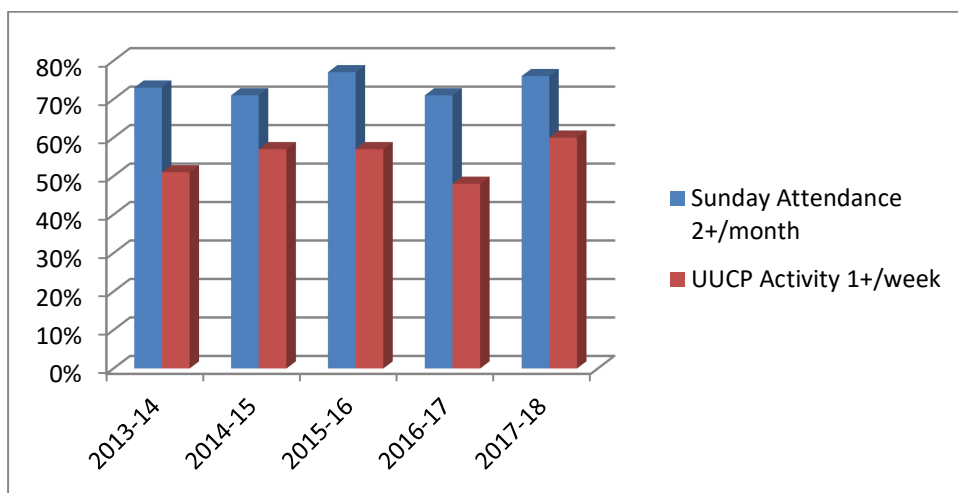
- Total # of Members: 435
- Total # of Participants: 699
- 5% in participants compared to the previous year
- Percentage: Approximately 160% (Note: participants are duplicated across programs rather than being tracked individually. Participants are drawn from the poll of approximately 600 members, friends and participant number rather than just comparing it to membership number.)

Participation patterns recorded in the REALM database indicate that 81% of UUCP members (88% among members who have joined in the past two years) are engaged in activities in the congregation (belongs or attends something outside of service), and 71% of members provide service in congregational life ("volunteer" in some way to serve the congregation: assist with community night, sing in the choir, participate in work day, etc.). That is a reliable measure of active participation that supplements the head count.

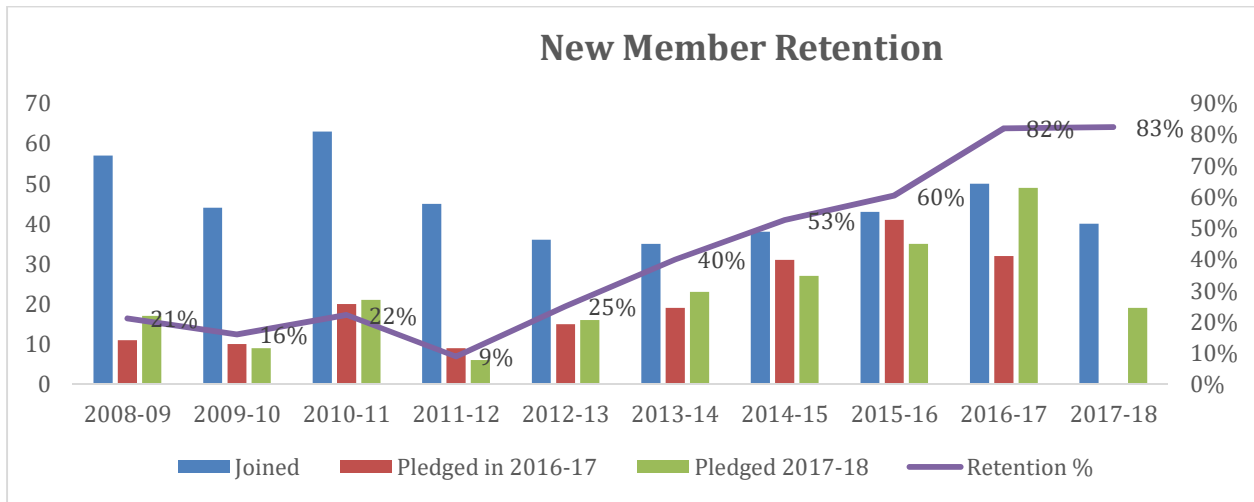
"Certified Members" are the UUA-certified membership numbers tabulated in January of the congregation year that is listed. Attendance numbers are defined as the average Sunday worship attendance during the period between and including Ingathering and the last Sunday in May.



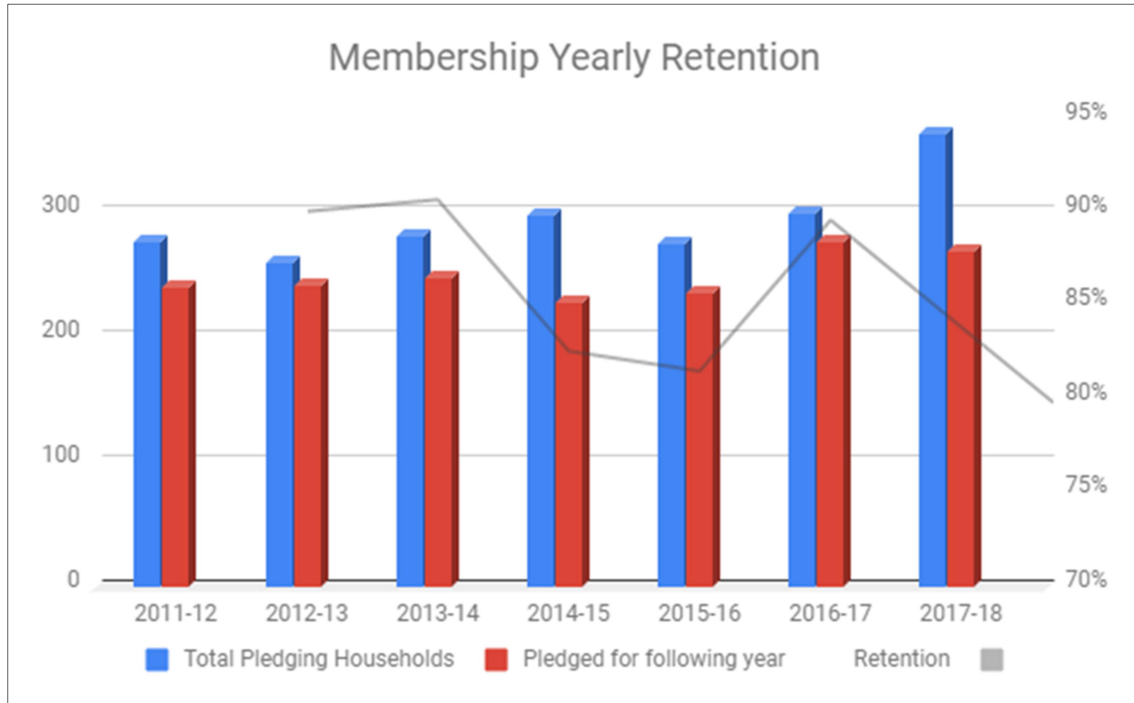
Sunday Attendance as a Percentage of number of Members: 56% (a 5% decrease from last year). The 2016-17 year had the highest worship attendance in decades, likely influenced by social and political conditions; the annual pattern shows fluctuation within a steady range.



Self Reporting from 2018 Survey: 76% of respondents attend on Sundays at least twice a month; 60% of respondents are at UUCP at least once a week. These findings are not surprising, since those who attend more frequently are more likely to complete a survey than those who do not.



- 5 Year New Member Retention for 2018 is 25%. This is the number of members who joined in 2012-2013 who pledged in 2017-18. The 2011-2012 cohort consistently tracks lower than other years, and the numbers began to rise with the group who joined the following year. New-member retention has been rising across the years, and with strengthened process for member engagement and connection, retention can be expected to continue to improve.

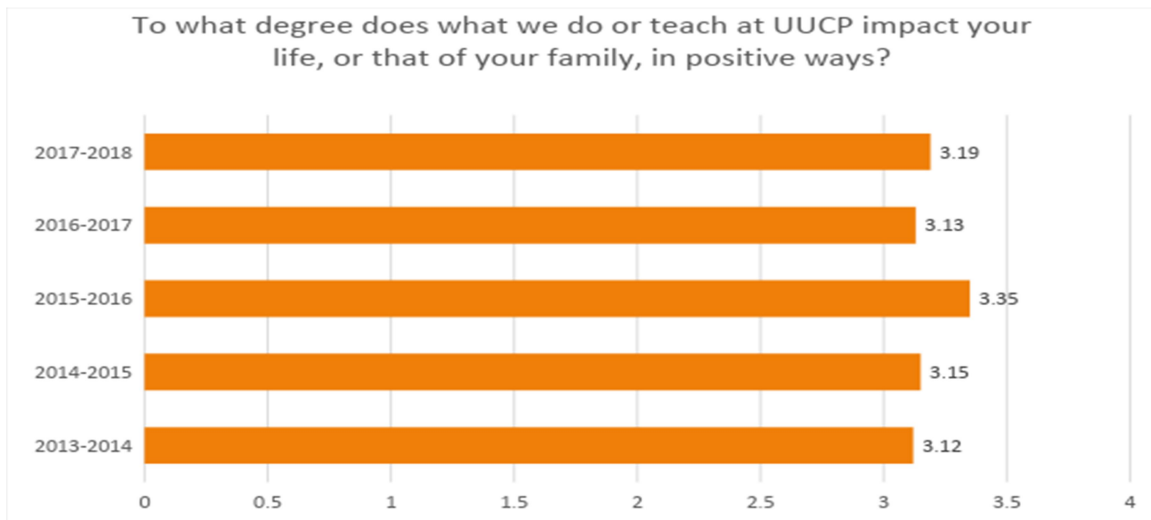
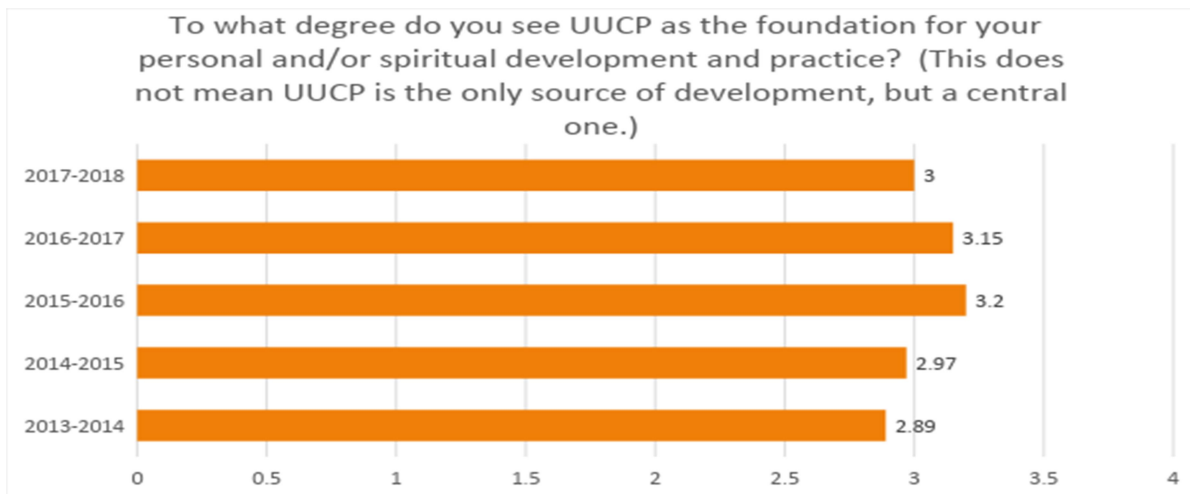


- Average Annual Membership Retention over 5 year period is 87%. The higher number of pledging units in 2017-18 reflects the addition of those members who join in the Coming of Age program, each of whom comprises their own pledging unit.

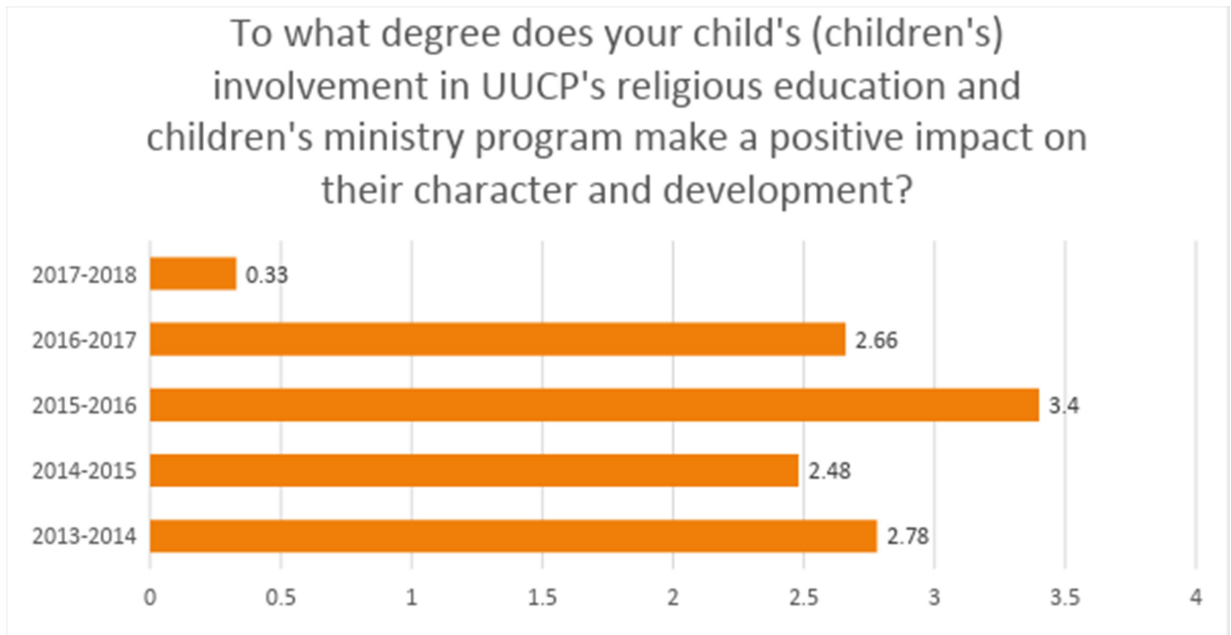
UUCP STRATEGIC IMPLEMENTATION PLAN: 2017-2018 PROGRESS REPORT

The graphs below use data collected from the Annual Survey, administered for the last three years. The May 2018 survey had 123 respondents: 98 who identified as active members, 11 as not-active and 14 non-member friends or participants. Past rates of survey response were 216 in 2017, 156 respondents in 2016, 166 respondents in 2015, and 218 survey respondents in 2014. As we close this strategic implementation cycle, this is the final year for the survey in this format.

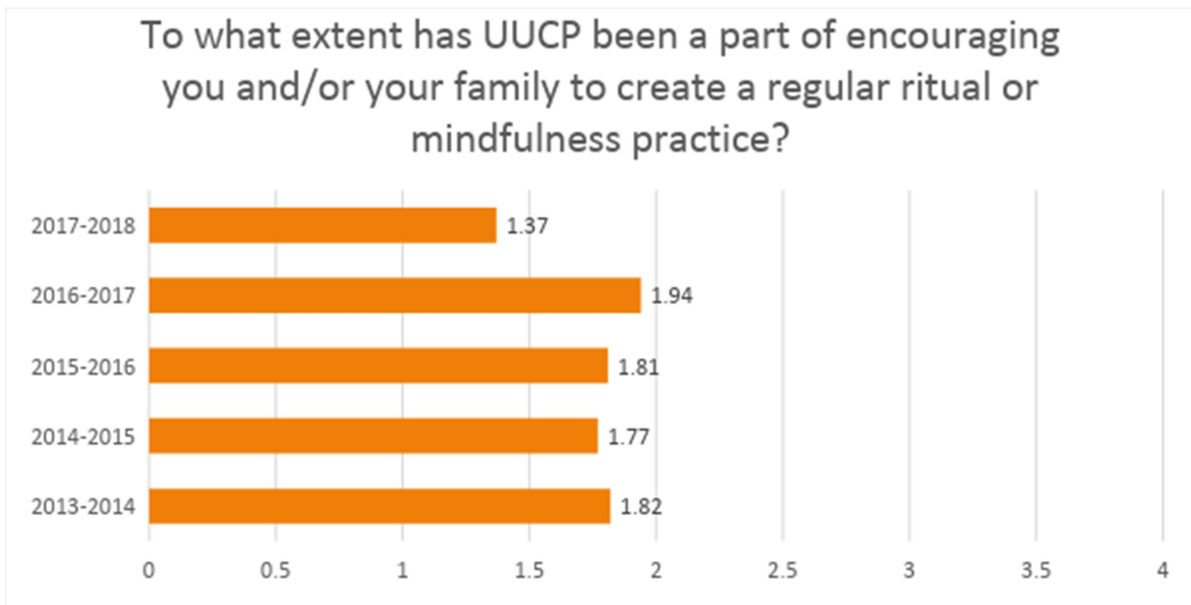
Answer Options Very much so - 4 3 2 1 Not at all - 0 N/A



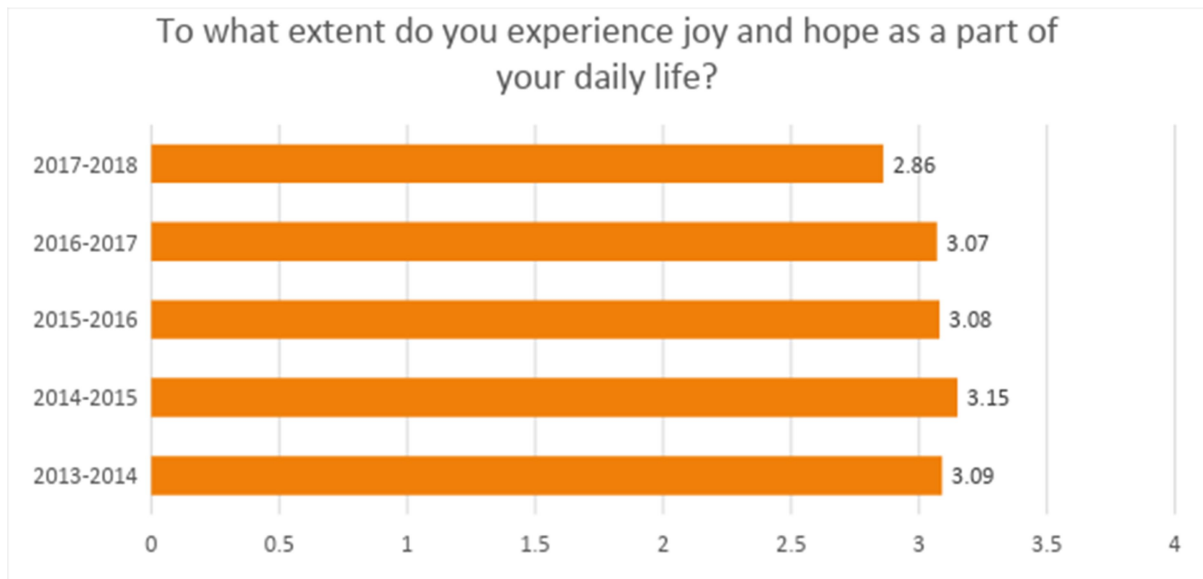
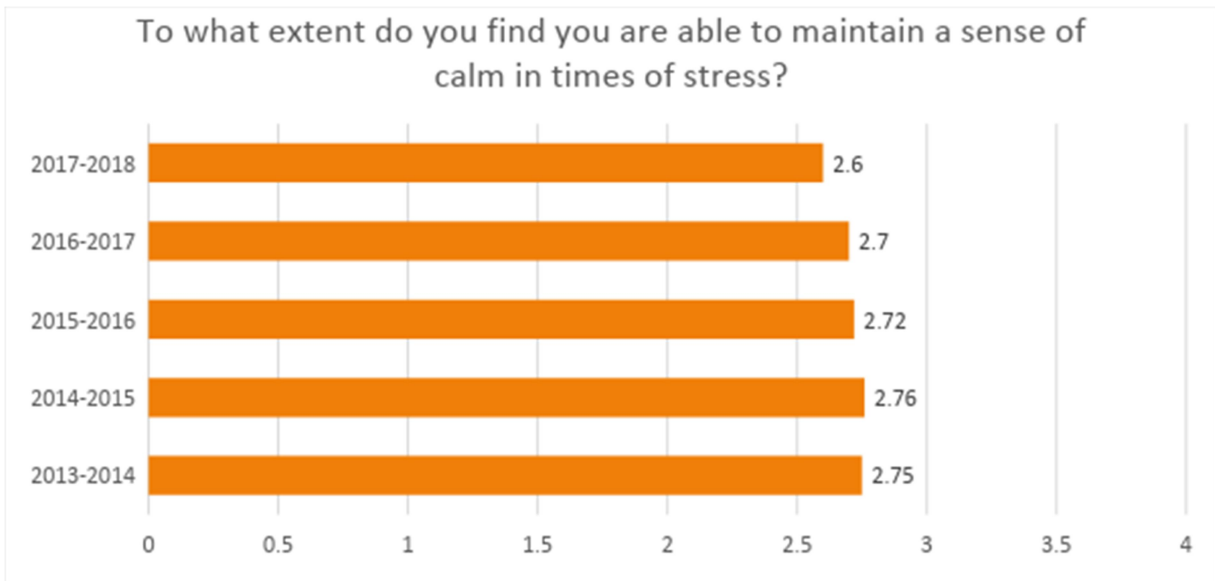
Responses about the role and impact of UUCP on the lives and spirituality of participants have remained relatively constant over the years in which this survey question has been asked.



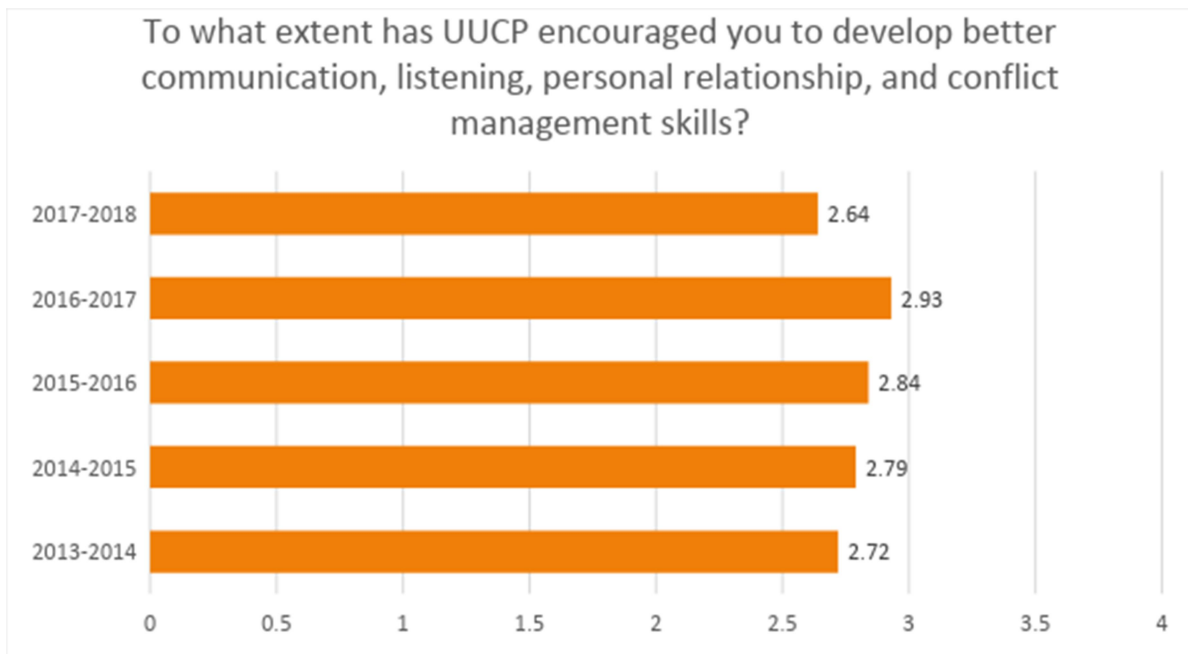
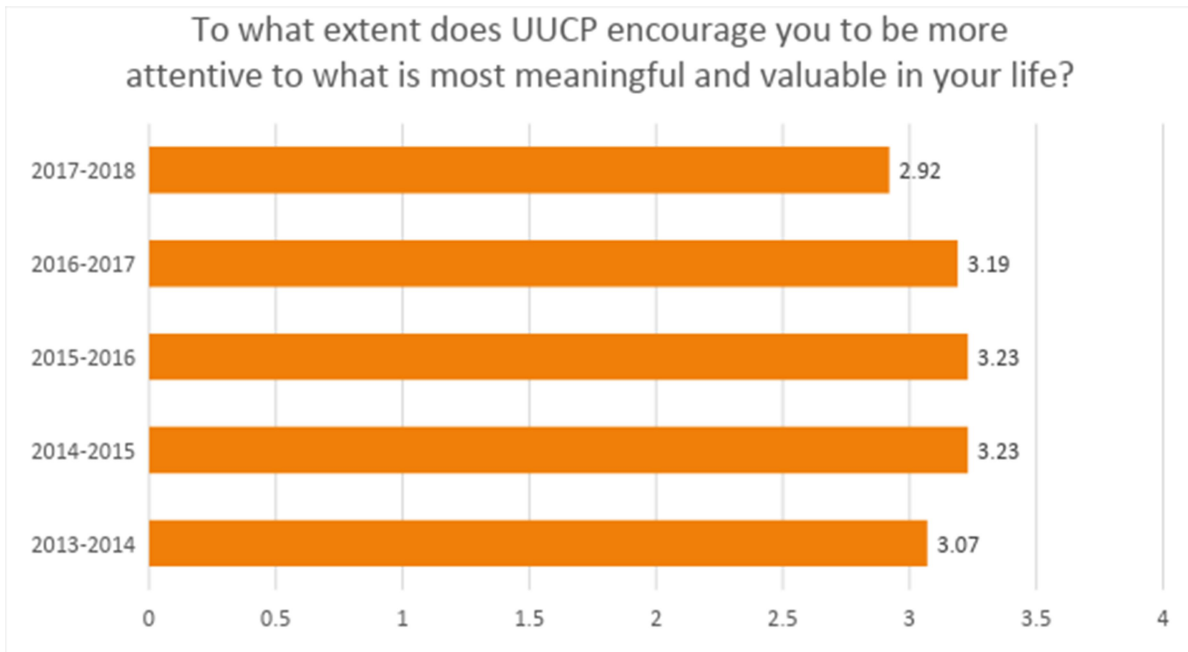
There was a very small number of respondents (15) answering this question, and only 11 respondents overall stated they regularly participated in Children’s Ministry programming, so it is doubtful that this response is meaningful.



Only 58 respondents answered the question out of 123 total.



The survey response to these questions about personal emotional health has held relatively steady over time, including in these times of social and political turmoil.



The survey response to these questions about the role of UUCP in supporting healthy emotional balance has likewise held relatively steady over time. This is an indicator of the positive role of a faith community in supporting the lives of its members, but not necessarily a reflection on specific programming or initiatives in the congregation.

Comparison to 5-year targets

In January 2012, specific 5-year targets were identified for each of the Ends. In 2015 those targets were adjusted based on previous years’ data or wanting to track additional data. Below is a comparison of the 5-year targets (adjusted in 2015) to our results for this year.

Tracking the participation of unique participants in congregational life is complex; the REALM database is proving to be a helpful resource, since attendance and participation can be tracked for individuals, but it is taking time to bring all its capabilities into full use.

	5 Year Target	2017-18 Measures
Percentage of members engaged beyond Sunday morning	120% (adjusted from 60% in 2015 to reflect a more accurate baseline)	81% active engagement of active UUCP members (88% among members who have joined in the past two years), based on database tracking.
Percentage of new members still members after 5 years (New Member Retention)	45%	25% as of 2018; that percentage is likely to rise based on stronger processes of joining and tracking engagement.
Determine baseline of overall annual membership retention		87% over a 5 year period
Annual increase in positive indicators of impact the ministry is having on people’s personal and spiritual lives as individuals and families (Added 2015)		The apparent impact of UUCP participation on the lives of those involved is quite positive, based on survey results. An annual increase may not be realistic, given the abundance of confounding factors.
Percentage of members attend UUCP once a week	65%	76% of survey respondents report attending Sundays at least twice a month; 60% report participating in UUCP activities at least weekly. This is not surprising, since those more engaged are more likely to complete a survey. The relationships among frequency of Sunday morning attendance, participation and congregational membership do not provide reliable indicator of congregational connection. National statistics report that “regular” attendance is now defined as “once a month.” Also, all activities include robust attendance by non-member participants and newcomers, and those numbers are also vital to health.

Among: UUCP is a healthy, vibrant, multigenerational, and multicultural religious community filled with committed uuvangelical Unitarian Universalists.

UUCP has adequate resources to fund a growing, thriving ministry. UUCP has an adaptive culture that does not reflect just one dominant culture. UUCP provides activities and worship that engage people and families across the generations. Members are passionate about UUCP and quick to share about its ministry and invite their friends and neighbors.

Mission Area: Welcoming all in building religious community, called to grow in spirit and share journeys

Five-Year Strategic Outcomes

UUCP is a healthy, vibrant community, with a campus that is well maintained, accessible and inviting, showing the care we invest in our spiritual home, a bustling campus throughout the week, lively and engaged worship, and a community life that inspires people and encourages them in their own growth and health.

UUCP is a truly multigenerational, multicultural community, reflecting a rare and precious model of community that encourages wider perspectives, dynamic relationships, and communication across generations and cultures. Our community is a visible expression of our core values—the worth and dignity of all people, the desire to learn and grow together. Through it we will be equipped to “welcome all.”

UUCP is filled with committed Unitarian Universalists demonstrating a great spirit of leadership and investment, both time and financial among members. In addition, we do not expect or wait for people to stumble across us, but rather we reach out to others and practice an invitational approach, making Unitarian Universalism commonly known in the wider community.

Key to achieving this outcome is training for members and leaders, evaluating current programming for children and youth, and evaluating intentional multigenerational programming. We measure how well we are achieving these ends through monitoring of attendance and participation levels in the programs for all age groups and specifically multigenerational programming. Another measure is the extent to which our leadership and membership are growing in their identification as multicultural. We also measure our progress toward increasing the accessibility, maintenance, and care of our campus. We measure increased commitment through participation, size of leadership pool, and giving levels. We also measure the degree to which we are visible and invited to participate in the larger community, and the extent to which members are growing more comfortable sharing our values and inviting others to UUCP.

SPECIFIC FIVE-YEAR TARGETS (2012 – 2017, revised for 2017-18 program year):

- A. We have accessible, visible, well-lit access to our campus and buildings
- B. UUCP campus is well maintained, cared for, and is growing to meet needs of the ministry
- C. 20% of paid staff identify as having a cultural identity other than white and straight
- D. 80% of paid staff has anti-racism, anti-oppression training and/or work experience
- E. Overall individual financial income to UUCP increases by 7% a year
- F. Double the participation numbers of children and youth in Children’s Ministry
- G. Increase intercultural awareness, competency and skills among members of UUCP
- H. Track members’ action in inviting people to UUCP events and service

Among: UUCP is a healthy, vibrant, multigenerational, and multicultural religious community filled with committed uuvangelical Unitarian Universalists.

Summary: The general appearance and functionality of the campus have improved in this fiscal year, with a new landscaping contract and ongoing attention to maintenance issues as they arise. We continue to seek out the most effective and efficient use of resources. We conducted a round-two capital campaign in the fall, with a focus on accessibility, efficient cooling systems, staffing for growth, and the creation of quality gathering space. Capital construction is anticipated to begin in summer 2018.

Sunday children's attendance continues to grow, with attention to quality programming in both the first and second worship hour, although most families seem to prefer coming in the first hour and so the programs are necessarily different to match the different size of the participation. Children's Ministry data, including attendance, are being integrated into the congregational database, which will strengthen the integration of family/child data into the overall tracking process. There are anomalies in the way children's registration and attendance have been counted and averaged, which we will correct next year.

Overall this year, there has been a sense of energy and capacity in the congregation in this transitional time. Key items of attention this year have included rebuilding a Stewardship Team and exploring stewardship practices for continued effectiveness in supporting the annual operating budget; finalizing the planning for the capital construction project; fully integrating Children's Ministry into the database, and continuing to strengthen programming in Children's Ministry and associated programs such as KidsKamp.

Among 1. (Target A. B). Create a construction team and implement and oversee congregation construction following Capital Campaign

Completed: 50%

The process this year was implemented with strong staff and congregational leadership, although it turned out that the schedule for achieving permits and initiating construction was substantially outside UUCP control. The contributions to the Capital Campaign have continued to come in, with about 2/3 of pledges paid off in this first year. As new members join they are invited to make a pledge, and various fundraising events this year (craft fair, auction) were dedicated to the capital fund.

Among 2 (Target A, B). Develop goals related to property management and establish a monthly workday

Completed: 90%

The process is in place, and was implemented on schedule; workday participation dropped off over the year so that event was discontinued in the spring.

Among 3 (Target E). Continue practice of sending one-year membership anniversary cards

Completed: 100%

The process is in place, and is being implemented on schedule

Among 4 (Target D, G). Conduct Round 2 of Identity Groups – coordinate with monthly themes

Completed: 100%

This process was carried out in Fall 2017 with good attendance and positive feedback.

Among 5 (Target F, G). Provide training for teachers on multi-age learning environments

Completed: 100%

The process is in place, and has been implemented on schedule

Among 6 (Target F) Provide intensive training for adults working with middle and high school youth

Completed: 100%

The process is in place, and has been implemented on schedule

Among 7 (Target G). Increase the multicultural expression of music at UUCP through four goals: 1. Make music of our members of Mexican and Indigenous heritage more central 2. Congregation can sing well a few hymns in Spanish 3. Congregation learns a hymn in ASL (sign language) 4. Introduce a couple of loopable/contemporary hymns.

Completed: 90%

The introduction of contemporary modes of singing (loopable hymns) will be facilitated in the future by the new visual projection equipment in the sanctuary. The goal to teach a hymn in ASL was dropped due to reduced availability of our contracted ASL interpreter.

Among 8 (Target D. G). Staff engage intentional reflection and awareness to gender issues and safety in the congregation

Completed: 100%

This staff activity was completed in Spring 2017. Sustained attention to awareness is ongoing.

Among 9 (Target F. G). Incorporate kids cooking into community nights

Completed: 100%

The process is in place, and was implemented on schedule

Among 10 (Target G). Community Night meals reflect multiple cultures

Completed: 100%

The process is in place, and was implemented on schedule

Among 11 (Target B). Implement and train people on new data procedures and database system as needed

Completed: 100%

The process is in place, and continues to be implemented on schedule as an ongoing activity.

Among 12 (Target G). Thinking about theological diversity, pilot multigenerational community experiences to explore connections between Unitarian Universalism and other faith traditions.

Completed: 100%

The process is in place, and is being implemented on schedule

Other Among activities: Congregational leadership has taken initiative to provide a craft sale, event auction and contra dance as fundraisers and community building events, as well as a Cabaret this year. This is a great example of staff moving back from taking the initiative, and those for whom the activities are important move into the gap. Staff members provide support and encouragement when that happens.

Comparison to 5-year targets

Below is a comparison of the 5-year targets to our results for this year.

► **We have accessible, visible, well-lit access to our campus and buildings**

The Capital Campaign planning and fundraising will provide resources to make the front door accessible with ramps and a walkway. There will be improvements to accessible patio and parking as well.

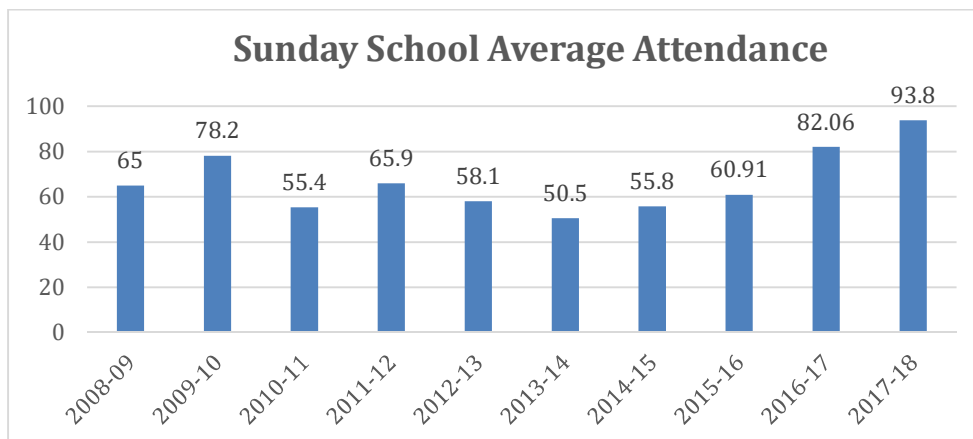
► **Our campus is well maintained, cared for and is growing to meet needs of the program and staffing**

This year included yard repair from storm damage, routine roof refurbishment of the Annex buildings, and the installation of a projector and screen in the Sanctuary and flat-screen in the Johnson Room for enhanced visual access. Landscaping is now maintained by a professional crew, and the Memorial Garden pool was filled with river rocks to stabilize that space until a permanent solution to water retention is found.

Planned capital improvements include a new heating and cooling system, improved parking and landscaping and hopefully a much more inviting and shaded patio to improve all-ages use.

► **Double the participation numbers of children and youth in Children’s Ministry in 5 years (Added 2015)**

Attendance and registration increased across all regular Sunday Children’s Ministry programs, with average attendance of 94 children and youth, a 15% increase from the previous year. A total of 203 children attended programming. Of those, 174 completed registration. On average children attended 1 programming day per month (this does not include multi-gen services or days they chose to be part of worship in the sanctuary or volunteer on campus). This is consistent with national trends defining regular attendance to be once a month.



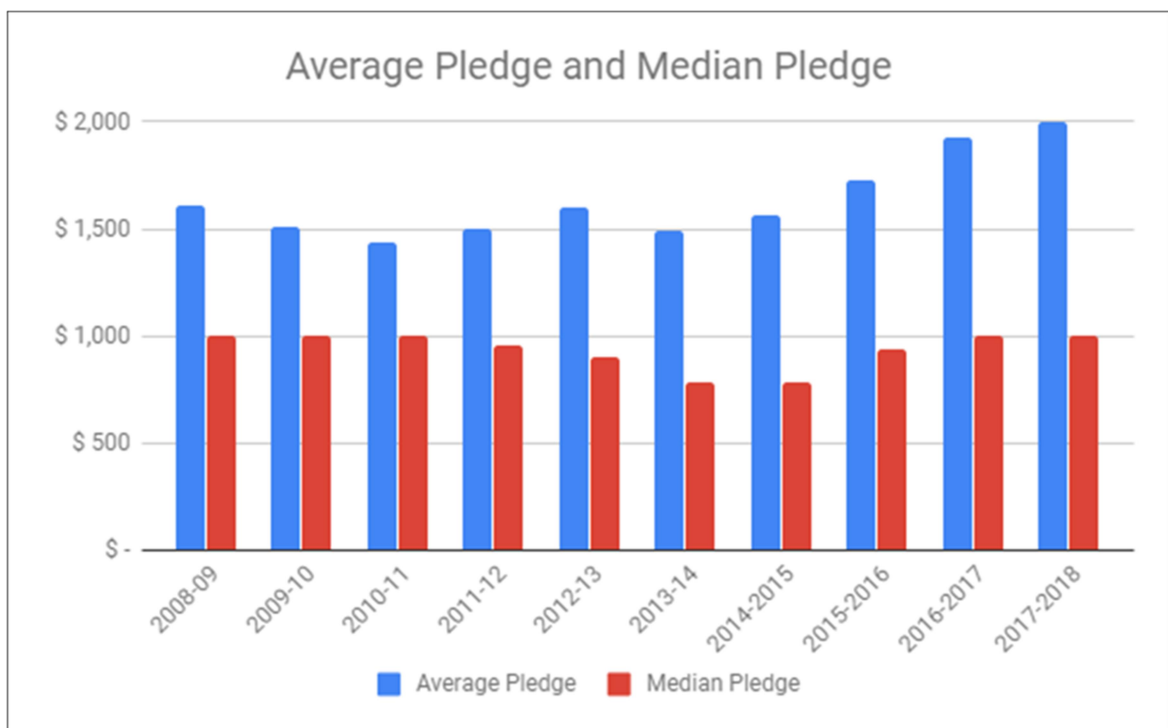
► **20% of paid staff identify as having a cultural identity other than white and straight**

2017-18: 33% ministry and administrative staff (not including custodial, sexton or Kids Kamp staff), identify as having an identity other than white and straight. With full staff including custodial and childcare (but not Kids Kamp), 29% identify with an identity other than white and straight.

► **80% of paid staff have anti-racism, anti-oppression training and/or work experience (Added 2015)**

75% of our staff have had anti-racism, anti-oppression training or work experience

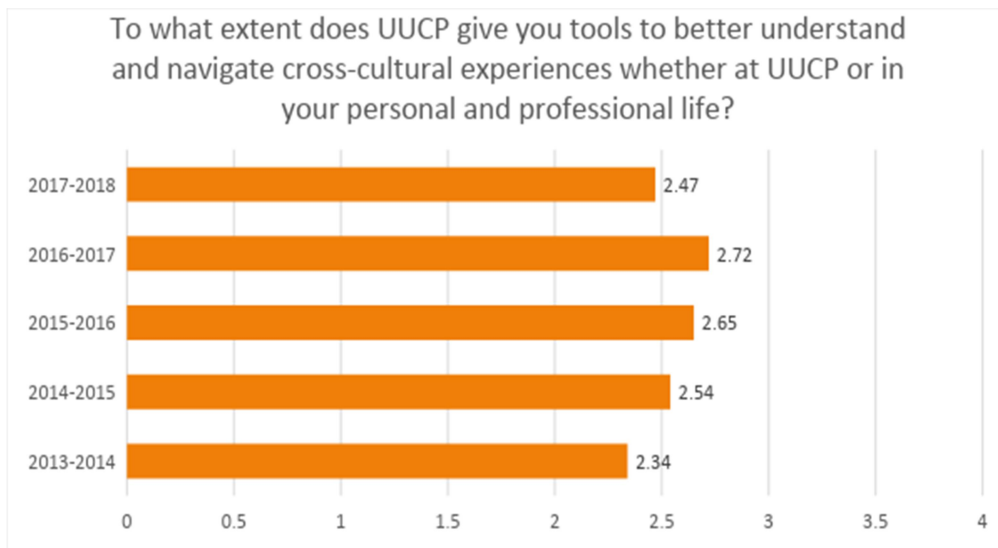
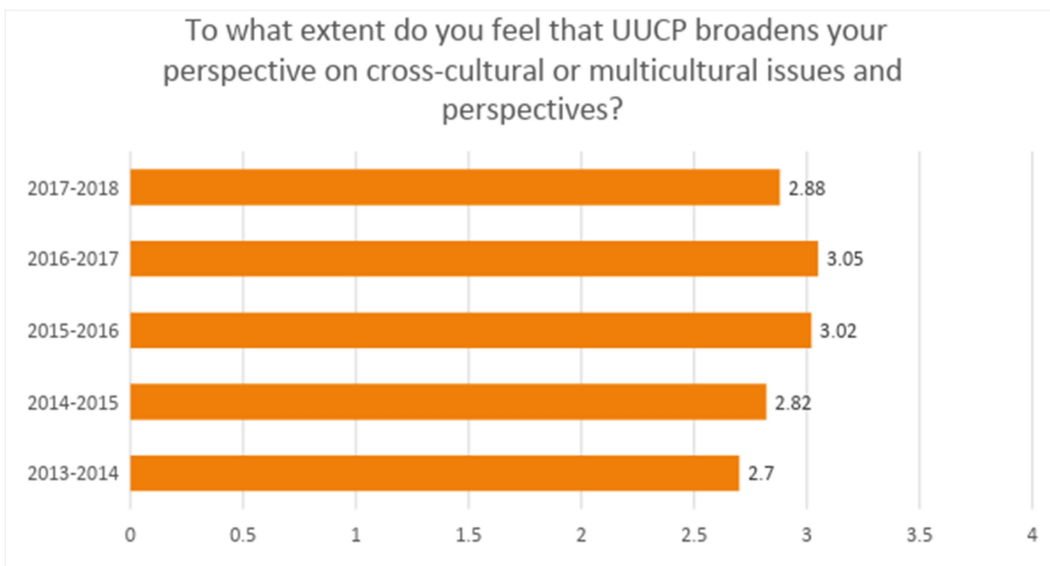
► **Overall individual financial income to UUCP increases by 7% a year (Added 2015)**

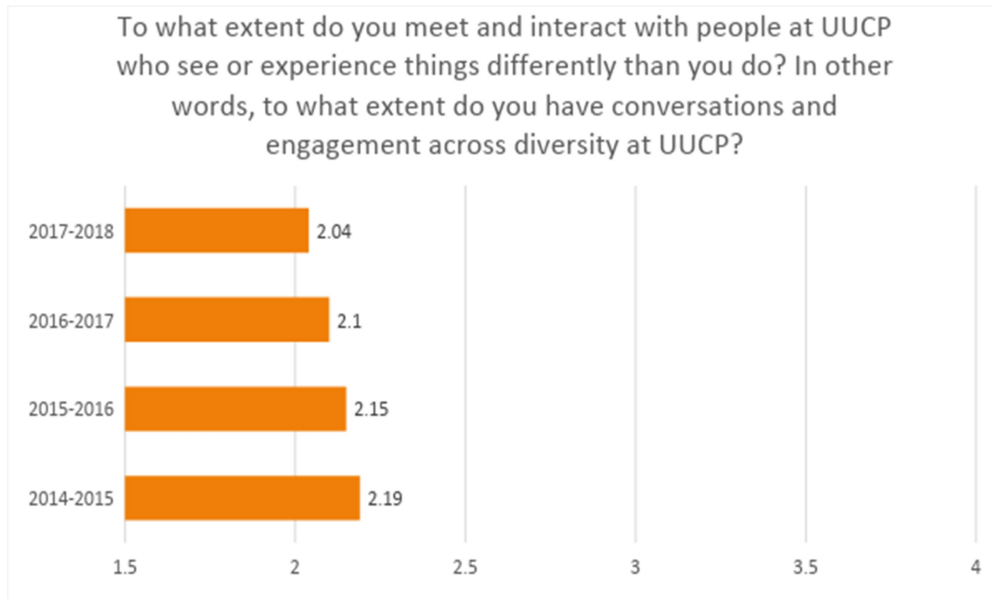


The median pledge held steady in the 2018 year, while the mean (average) pledge increased by nearly 10% from the previous year, maintaining the trend of substantial increases in average pledges over the past five years.

► **Increase intercultural awareness, competency and skills among members of UUCP (Added 2015)**

Survey data in the three charts below show small changes in these numbers year over year. What is most striking, given the focus this year on White Supremacy, inclusion and cultural competence, is the lack of significant change in people’s perception that UUCP provides the tools for better cross-cultural engagement and small decrease in people’s actual experiences interacting across difference at the congregation.





*Question has only been asked for the last four years.

The spring survey also asked questions measuring respondents' experiences that increased intercultural awareness, both in general and at UUCP, as well as their actions in inviting others to the congregation. Unfortunately, changes in the survey software resulted in those responses not being captured, so we do not have data for this final year of measurement.

Beyond: UUCP is a flagship congregation in the UUA and a beacon of moral conscience to the world.

UUCP is a prominent congregation within the UUA that shares its resources and best practices widely with other congregations. UUCP is not afraid to take public stands and join with others on issues that are central to our core values.

Mission Area: Grow in spirit, advance justice

Five-Year Strategic Outcomes

As a flagship congregation, we have ministries that are so dynamic, professional and strong—operating at such a level of impact and meaning—that others look to our programming as a resource for their own. We have strong leadership and ministries, and by sharing these with the larger UU Association of Congregations we are of service and strength to the larger association. We have increased our financial giving to the association and other charitable organizations.

We are a beacon of moral conscience, and we provide an organized, sustained religious voice in the public square that advocates for our core values—particularly of equity, compassion and dignity. We have a positive, visible impact which results in a community and a state that more highly values equality, defends against discrimination based on identity, and honors the responsibility we have to the environment.

A key measure of this end is the extent to which others are inquiring or reaching out to UUCP to learn from our ministries. Part of our work is to identify strengths and focus resources on best practices. In addition to the dedicated staff position of Director of Justice and Pastoral ministries, all staff take seriously the commitment to justice as part of their ministry areas.

SPECIFIC FIVE-YEAR TARGETS (2012 – 2017, revised for 2017-18 program year):

- A. We are a teaching congregation, funding a Ministerial intern program
- B. Youth and adults from UUCP serve on district, regional, and/or national committees and boards of our Association
- C. UUCP recognizes among its members, and develops and encourages in its members, community service and leadership beyond UUCP (including in public office, public service, and nonprofit leadership)
- D. We create systems or become part of programs that allow us to share our best practices with other congregations (including programs at GA or DA)
- E. We have systems and staff in place for strong outreach to communities and organizations beyond UUCP (including other UU congregations) and partnerships for collective work on key issues
- F. We see successful wins in dismantling anti-immigrant laws, policing and tactics in Arizona
- G. We see measurable improvements in acceptance of equality for GLBT people in AZ.

3. Beyond: UUCP is a flagship congregation in the UUA and a beacon of moral conscience to the world.

75% achievement

Summary: This second year of a staff position dedicated to improving social justice connections has significantly improved the capacity for team development and emerging leadership in several areas of social justice. Website and communications processes have been a staff focus in the first half of this year, and will continue into the spring.

Key items of attention this year included a focus on best practices for congregational communication and uses of the website, continuing the work in community engagement for social justice, and congregational work on issues of race, privilege and white supremacy.

Beyond 1 (Target E). Improve awareness and comprehension of social justice system at UUCP; make the work more inviting and accessible to all.

Completed: 100%

The process is in place, and is being implemented on schedule.

Beyond 2 (Target E) Evaluate and explore ways to employ Share the Plate to foster deeper community connections.

Completed: 100%

The process is in place, and is being implemented on schedule.

Beyond 3 (Target C. F. G). Pilot a small group for spiritual reflection for people engaged in social justice work.

Completed: 0%

This activity, which had been implemented in the past, did not materialize this year, and was dropped from tracking as a goal.

Beyond 4 (Target F). Establish racial justice and environmental justice teams.

Completed: 50%

An environmental justice team (Green Sanctuary) was established; racial justice work has been engaged this year in the White Supremacy teach-ins and other activities; no racial justice team has yet been established, and that work has been led primarily by staff with congregational participation.

Beyond 5 (Target E.F.G). Strengthen ties to UUJAZ.

Completed: 100%

The process is in place, and is being implemented on schedule.

Beyond 6 (Target C). Implement children's experiences at social justice events.

Completed: 100%

The process is in place, and is being implemented on schedule.

Beyond 7 (Target C,D,E). Implement OWL in the community.

Completed: 0%

This activity was grant-dependent. In the absence of grant funding, the specific goal will not be met; however, other approaches to making OWL programming more accessible are being identified and implemented

Beyond 8 (Target D. E) Implement improvements to web site including more use of carousel, more photos, more promotion of events and programs. All staff send material to Office Assistant. Work toward a staff wide photo bank.

Completed: 100%

The process is in place, and is being implemented on schedule.

Beyond 9 (Target E). Draft and finalize publicity guidelines for staff to promote activities better through Social Media. Hold people to guidelines.

Completed: 100%

The process is in place, and is being implemented on schedule, along with staff review of the overall communications plan, guidelines and protocols, and is being implemented on schedule

Beyond 10 (Target C, D). Create quarterly reminders to staff and Stats document to track how often best practices are shared with other congregations.

Completed: 60%

The process is in place, and is being implemented on schedule.

Comparison to 5-year targets

Below is a comparison of the 5-year targets to our results for this year.

▶ **We are a teaching congregation, funding a Ministerial Intern**

This target was met for one year, 2015-2016, and it helped the congregation move toward a second full time ministry position. Returning to the role as a teaching congregation is a good goal for the future, once the current ministerial and staff transitions are completed.

▶ **UUCP youth and adults serve on district, regional and/or national committees and boards of our Association.**

We have UUCP members serving in UU volunteer or staff leadership beyond UUCP as well as a number of youth and adults making stronger connections to national UUA programming.

- Geoff Anderla is the Camping Ministries Director for Camp DeBenneville Pines
- Emrys Staton served this year as chaplain for youth camps at Camp DeBenneville Pines, a program leader with the UU College of Social Justice, a staff member of the Goldmine Youth Leadership School.
- Katie Resendiz serves as a THRIVE facilitator and is connected with Finding Our Way Home and other systems supporting UU professionals of color.
- Smoot Carl-Mitchell is Treasurer of the PSW District.
- Bunny Hodas serves on the UUSC Council for Innovative Social Change, the UUSC Stewardship Circle, and the UUA President's Council.
- Several of our youth participate in district and national youth opportunities, including connecting initiatives for people of color and GLBT Q organizing in the UUA
- William Lester participates in BLUU (Black Lives of UU), DRUUM, and other organizations for UUs of color.

▶ **UUCP recognizes among its members and develops and encourages in its members, community service and leadership beyond UUCP (including in public office, public service and non profit leadership).**

We do not have a mechanism to gather this information, nor any formal recognition for community leadership roles.

► **We have systems and staff in place for strong outreach to communities and organizations beyond UUCP and partnerships for collective work on key issues**

The Advancing Justice ministry team has become connected this year to Puente, the Center for Neighborhood Leadership, Arizona Faith Network and the Phoenix Restoration Project. The Refugee support team was connected this year to the International Rescue Committee. The Green Sanctuary Team is connected to CHISPA and to the Arizona Faith Network. We have also made connections with local United Church of Christ congregations in conjunction with the Women’s March and the student March for Our Lives, and supported local leadership of the Poor People’s Campaign.

► **We see successful wins in dismantling anti-immigrant laws, policing and tactics in Arizona**

UUCP congregants and staff continue efforts to shape public opinion and legislative decisions. UUCP members and staff showed up to protest in downtown Phoenix during Trump’s visit on August 22, and several were caught up in the police’s violent tactics used against the crowd. They then participate in an action to interrupt a Phoenix City Council meeting to provide testimony regarding police violence.

When the phase-out of the DACA program was announced, UUCP served as fiscal agent for a DACA scholarship fund to pay for applications or renewal fees for DACA status. Between UUCP and the community more than \$20,000 was collected and distributed to CNL and other partner groups.

Several UUCP members attended the UUJAZ Issues and Action Day on October 14. The annual Day at the Legislature in February, coordinated by UUJAZ, brought about forty UUCP members to the state capitol to meet with senators and representatives. UUCP hosted a youth overnight to encourage teens from other congregations to show up at the capitol.

The Advancing Justice team has mobilized congregational energy in support of legislative action for social justice, including issues related to immigration policy and practice.

► **We see measurable improvements in acceptance of equality for GLBT people in AZ.**

National culture is changing, data show that public acceptance is growing even in the face of resistance by national and state leadership; it is beyond our capacity to track local/state changes accurately, much less to measure UUCP influence in those changes.