2012-2013
Annual Report
Our Values

The Transcendent, timeless qualities of our religious community we strive to embody in all we do.

Our Actions Embody:
- Community
- Courage
- Love
- Diversity
- Generosity
- Joy

Our Mission

The Unitarian Society is a loving community of seekers:
- Living with integrity
- Nurturing Wonder
- Inspiring Action
<table>
<thead>
<tr>
<th>Section</th>
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</thead>
<tbody>
<tr>
<td>Board of Trustees</td>
<td>1</td>
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<tr>
<td>Notified Agenda for Annual Meeting</td>
<td>2</td>
</tr>
<tr>
<td>UU Legislative Ministry Covenant</td>
<td>3</td>
</tr>
<tr>
<td>Membership Statistics</td>
<td>4</td>
</tr>
<tr>
<td>2013-2014 Proposed Budget</td>
<td>5</td>
</tr>
<tr>
<td>Notes on Proposed Budget 2013-2014</td>
<td>6</td>
</tr>
<tr>
<td>Climate Resolution Proposed</td>
<td>7</td>
</tr>
<tr>
<td>Strategic Long Range Plan 2012-2018</td>
<td>9</td>
</tr>
<tr>
<td>Executive Report</td>
<td>12</td>
</tr>
<tr>
<td>Ministry &amp; Program Listings</td>
<td>29</td>
</tr>
<tr>
<td>Board of Trustees Report</td>
<td>31</td>
</tr>
<tr>
<td>Nominating-Leadership Development Committee</td>
<td>32</td>
</tr>
<tr>
<td>Treasurer Report</td>
<td>32</td>
</tr>
<tr>
<td>Finance Committee</td>
<td>33</td>
</tr>
<tr>
<td>Audit Committee</td>
<td>34</td>
</tr>
<tr>
<td>Annual Campaign</td>
<td>35</td>
</tr>
<tr>
<td>Endowment Fund</td>
<td>36</td>
</tr>
<tr>
<td>Planned Giving Advisors</td>
<td>37</td>
</tr>
<tr>
<td>Additional Detailed Committee &amp; Program Reports</td>
<td>40</td>
</tr>
<tr>
<td>The Alliance</td>
<td>40</td>
</tr>
<tr>
<td>Academy for Healing Arts</td>
<td>41</td>
</tr>
<tr>
<td>Santa Barbara Children’s Chorus</td>
<td>41</td>
</tr>
<tr>
<td>Freedom Warming Centers</td>
<td>41</td>
</tr>
<tr>
<td>Starr King Parent Child Workshop</td>
<td>42</td>
</tr>
<tr>
<td>USSB Calendar</td>
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Board of Trustees
Officers – 2012/2013 Fiscal Year

President – Gun Dukes
Vice-President – Bart Woolery
Corporate Secretary – Ken Ralph
Treasurer – Kathy Leer

Members

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<thead>
<tr>
<th>Name</th>
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<td>Doug Thomas</td>
<td>963-2673</td>
<td>687-3237</td>
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<td>Ken Ralph</td>
<td>966-2485</td>
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<td>Bart Millar</td>
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<td>Melinda Staveley</td>
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Nominating Committee

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<td>Anna DiStefano</td>
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<tr>
<td>Gary Welterlen</td>
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<td>Carol Schwyzer</td>
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<tr>
<td>Terri Stelzer</td>
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<tr>
<td>Mary Ellen Hoffman</td>
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Staff - 2012-2013

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<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Phone Ext</th>
<th>Email Address</th>
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<tr>
<td>Minister</td>
<td>Aaron McEmrys</td>
<td>222</td>
<td><a href="mailto:minister@ussb.org">minister@ussb.org</a></td>
</tr>
<tr>
<td>Assistant Minister</td>
<td>Julia Hamilton</td>
<td>244</td>
<td><a href="mailto:congregationallife@ussb.org">congregationallife@ussb.org</a></td>
</tr>
<tr>
<td>Director of Administration</td>
<td>Nancy Edmundson</td>
<td>225</td>
<td><a href="mailto:director@ussb.org">director@ussb.org</a></td>
</tr>
<tr>
<td>Director of Lifespan Religious Education</td>
<td>LeeAnn Williams</td>
<td>229</td>
<td><a href="mailto:lifespan@ussb.org">lifespan@ussb.org</a></td>
</tr>
<tr>
<td>Children’s RE Coordinator</td>
<td>Tracey Goforth</td>
<td>227</td>
<td><a href="mailto:re@ussb.org">re@ussb.org</a></td>
</tr>
<tr>
<td>Youth Coordinator</td>
<td>Adam Shive</td>
<td>227</td>
<td><a href="mailto:youth@ussb.org">youth@ussb.org</a></td>
</tr>
<tr>
<td>Office Manager</td>
<td>Anna Royer</td>
<td>224</td>
<td><a href="mailto:office@ussb.org">office@ussb.org</a></td>
</tr>
<tr>
<td>Membership Coordinator</td>
<td>Becca Claasen</td>
<td>221</td>
<td><a href="mailto:membership@ussb.org">membership@ussb.org</a></td>
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<tr>
<td>Facilities Use Coordinator</td>
<td>Celina Paul</td>
<td>223</td>
<td><a href="mailto:facilities@ussb.org">facilities@ussb.org</a></td>
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<tr>
<td>Building Manager</td>
<td>Rob Brown</td>
<td>230</td>
<td><a href="mailto:building@ussb.org">building@ussb.org</a></td>
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<tr>
<td>Chancel Choir Director</td>
<td>Ken Ryals</td>
<td>240</td>
<td><a href="mailto:music@ussb.org">music@ussb.org</a></td>
</tr>
<tr>
<td>Pianist</td>
<td>Heather Levin</td>
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UNITARIAN SOCIETY OF SANTA BARBARA
NOTIFIED AGENDA FOR ANNUAL MEETING
June 9, 2013,
12:15 pm, Parish Hall

1. Opening and Call to Order Gun Dukes, President, Board of Trustees 2013

2. Affirmation of Covenant, Core Values, and Mission Member, Board of Trustees 2013

3. In Memoriam Reverend Aaron McEmrys & Reverend Julia Hamilton

4. Additions or Deletions from Agenda if 20% of membership present

5. Election of Board of Trustees and Nominating Committee Members

6. Year in Review Our Year Ahead: A Retrospective; Celebration & Look Ahead Rev. Aaron McEmrys, Gun Dukes, Rev. Julia Hamilton

7. Annual Fiscal Plan Presentation and Vote to adopt Fiscal Plan

8. Vote to Adopt Congregational Resolution on Climate Change

9. Vote to receive Annual Reports

10. Installation of Board and Nominating Committee

11. New Business (additional agenda items)

12. Closing

13. Adjournment

Official Membership at meeting notice: 502
Quorum to conduct business: 10% of 502= 51 members
Quorum to make additions or deletions from Agenda: 20% of 502= 101 members
UU LEGISLATIVE MINISTRY COVENANT

Covenant of Collaboration

The Unitarian Society of Santa Barbara wishes to collaborate with the UU Legislative Ministry, CA. We will join with the network of California UUs who are living out our faith by educating, organizing, and advocating for public policies that:

- uphold the worth and dignity of every person
- further justice, equity, and compassion in human relations
- ensure use of the democratic process
- protect religious freedom, and
- promote respect for the interdependent web of all existence

Our congregation will:

- Provide annual input to UULM board as to the justice priorities that are important to our congregation and its members
- Make one or more UULM justice issues a part of our congregation’s social justice ministry agenda
- Designate a UULM Team Leader(s) and support their work to:
  - foster UULM support, visibility, and involvement in our congregation
  - designate leader(s) to coordinate education and action on those UULM justice issues with which our congregation wishes to engage
  - encourage communication between UULM and our congregation
- Send an annual contribution to the UULM and/or the UULM Action Network

We affirm that UULM and our congregation will renew this covenant annually, creating opportunity for feedback and planning; either UULM or the congregation may choose to end our collaboration at any time.
# MEMBERSHIP STATISTICS

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<tr>
<th>Total Membership:</th>
<th>June 6, 2012</th>
<th>520</th>
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## New Members

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<td>Tina Wilson</td>
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<tr>
<td>Martin Allen</td>
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<tr>
<td>Howard Wittausch</td>
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<td>Sarah Schroeder</td>
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<td>Ben Schroeder</td>
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<td>Adrienne Demboski</td>
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<td>John Demboski</td>
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<td>Jeff Hill</td>
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<td>Taglito Arnold</td>
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## Reinstated Members

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## Resignations

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<td>Christine Owens</td>
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<td>Susan Gordon</td>
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<td>Deborah Lazaarri</td>
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<td>Tina Wilson</td>
<td>Greg Sinicrope</td>
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<td>Carlos Barajas</td>
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<td>John Demboski</td>
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## Removed

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## Deaths - Members

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<td>Tina Wilson</td>
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<td>Robert Bailey</td>
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## Deaths - Friends

<table>
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<tr>
<td>Tina Wilson</td>
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<tr>
<td>Martin Allen</td>
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## Births

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<td>Ronan Conner Newlan</td>
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## Weddings

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<tr>
<td>Mimi Bradley &amp; Rory Moore</td>
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## 2013-2014 Proposed Budget

### USSB Proposed Budget 2013-2014

Discussion Town Meeting Sunday, June 2, Parish Hall 10:30 am
Annual Congregation Meeting Vote to Adopt Sunday, June 9, Parish Hall 12:15 pm

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<td><strong>Revenue</strong></td>
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<tr>
<td>Annual Membership Pledges</td>
<td>$576,520</td>
<td>$530,000</td>
<td>$520,000</td>
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<tr>
<td>Fundraising, Grants, Admin Fees</td>
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<td>$116,100</td>
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<td>Outreach Collections</td>
<td>$20,000</td>
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<tr>
<td>Room Use, Weddings, Rentals, etc.</td>
<td>$133,500</td>
<td>$140,200</td>
<td>$143,800</td>
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<td>Investment Activity</td>
<td>$83,790</td>
<td>$81,800</td>
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<td>From Additional Minister Accruals</td>
<td>$25,590</td>
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<td><strong>Total revenue</strong></td>
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NOTES ON PROPOSED BUDGET 2013-2014

Operating Revenue

- **Annual Membership Pledges** based upon current year projections, known commitments to current annual campaign, and projections of new memberships.
- **Fundraising, Grants & Administrative Fees** are based upon current year projections and next year’s plans. Service auction will be held in fall. Administrative fee related to Warming Center Fiscal Agency. No grant income identified or budgeted to date.
- **Outreach Collections** are not supported in 2013-2014 budget.
- **Room use, Weddings & Rentals** based upon known contracts and current year projections. This item includes rental for houses at 124 E. Arrellaga and 113 E. La Paz, SK Parent Child Workshop, weddings and other room users.
- **Investment Activity** is from USSB Endowment distribution, and Cummins Oregon Community Foundation distribution.
- **Additional Minister Accruals** are funds that have been accrued in prior year to assist a transition period of funding the additional minister position for 4 years; 2011-2012 through 2014-2015; including portion of annual Cummins distribution.

Operating Expenses

- **Staff Expense** reflects staff realignment to program activity and reduction in existing hours to several staff positions with no layoffs or loss of benefits to employees. Significant reduction in staff capacity that will affect all areas of programming. Compensation to Associate Minister re-negotiated and all staff hiring frozen and not cost of living increase.
- **Facilities Expense** includes insurances for property and liability; regular maintenance, major maintenance, contract services for gardening, custodial and security services, utilities, supplies, and organ maintenance, and similar to previous years, earthquake self-insurance accrual ($9,000/year).
- **Administration Expense** includes computers, telephone, bookkeeping, office equipment leases, supplies, postage and newsletter.
- **Outreach Distributions** are not supported by this budget.
- **Supplements to Programs** Program supplies costs and board expenses, reduction to all areas from prior year.
- **Denominational Support** based on official membership of 502 reported on February 1, 2012, 45% of requested Fair Share from UUA and PSWD.
- **Interest Expense** is interest on 2008 Building Project Loans and La Paz Property.
Proposed Congregational Resolution on the Climate Crisis

At our Annual Meeting on June 9th, the congregation will be asked to vote on a congregational resolution that affirms the Unitarian Society’s concern about the growing threat of climate change and our resolve to actively engage this issue. A “Climate Resolution Task Force” has been working on the text of this resolution for several months, and presented a draft to the congregation on Earth Day. The final version, printed here, incorporates the feedback received after that draft was presented. Grounded in our sense of interdependence and our obligation to put our faith into action, we hope that everyone at the Unitarian Society will engage with this effort.

Presented by the Climate Resolution Task Force: Martin Allen (chair), Elizabeth Roscoe, Donald Margerum, Mark Hamilton, Ken Ralph, Becca Claasen and Rev. Julia Hamilton.

A RESOLUTION ON THE CLIMATE CRISIS

By a vote of _____ for, and _____ against, with _____ abstaining, the Unitarian Society of Santa Barbara (The Society), in accordance with its Constitution, adopts the following resolution.

Whereas, our Society, as a member congregation of the Unitarian Universalist Association, has agreed to affirm and promote “Respect for the interdependent web of all existence of which we are part."

Whereas, the Unitarian Universalist Association has issued a Statement of Conscience on the threat of global warming and climate change,

Whereas, the planet is under increasingly urgent threat due to the growing climate crisis and human activity is widely acknowledged to be responsible for bringing about this crisis,

Whereas, the next few years are critical in determining whether we, as people of the planet, can respond quickly and effectively to lessen the impacts of the crisis,

Whereas, faith communities can serve a vital role through local actions and in calling upon our elected leaders to implement effective policies,

Therefore be it resolved that The Unitarian Society of Santa Barbara pledges to do what it can to bring about the systemic changes necessary to move toward a more life-sustaining society. The Society agrees to:
• Affirm the serious threat that climate change poses to life as we know it on this planet.
• Support actions on behalf of the congregation that address the changes needed to make an impact on this issue, included but not limited to participating in public witness, supporting specific public policies, and otherwise engaging in public advocacy for a more sustainable society.
• Regularly re-examine and update the science and data supporting our stands on public climate policies with a willingness to modify or change our stands if so indicated by such a review.
• Consider ways that our congregation can reduce our own negative impact on the environment and place a priority on asking the question, “How does this action impact our commitment to sustainability?”
• Educate ourselves about the effects of climate change, particularly as it relates to communities who will be disproportionately affected by its negative impact.
• Examine the ways that this issue intersects with other justice concerns.
• Prepare ourselves to respond to the crisis creatively, collaboratively and in the spirit of our covenant with one another and our Unitarian Universalist values.
• Seek out ways to work with local, national and international organizations that share our goals.

Be it further resolved, this resolution is just one step in the process of discerning how we, as a congregation and a leader in our community, can have a positive impact on creating a sustainable future for life on our planet.
The Strategic Long Range Plan (SLRP) is a guide for the Congregation, the Board of Trustees and staff as well as lay leadership in all areas. It is a living document that can and will change as we move forward during the five year timeline. Each year the SLRP is revised, extended, and approved annually by the Board of Trustees. The Congregation votes as needed at the annual meeting in June of each year when Priorities or Goals are changed. For the coming year there are no changes in Priorities and Goals recommended. Objectives were updated by the Board of Trustees on May 15, 2012. Our Board of Trustees is not recommending any changes to our LRP at this time because we know that what we have learned through our Mission/Vision process will guide the Board’s planning. The Board’s next step with tying long range planning to our Mission will be establishing monitoring processes tied to the Ends that have been articulated by the Board. Thus far USSB remains highly successful at accomplishing virtually every goal we set for ourselves in the LRP.

**The strategic priorities and goals remain the same:**
- To become an increasingly age diverse congregation.
- To experience growth with an increasing outward focus.

Growth means more than numbers of members. Our SLRP defines growth as maturity and wisdom, as strength that generates energy, and in action of faith-driven activities and programs in the community.

**The SLRP includes phasing of these goals and objectives into estimated years.**
The implementation of the goals and objectives is prioritized over the five year period based on availability of discretionary resources (staff, volunteers, finances and facilities). Each phase has an overriding theme that helps to prioritize timing of the objectives over the five years.

**PHASING OF GOALS FOR STRATEGIC PLAN 2010-2018**
GOALS: Our SLRP has eight goals that remain unchanged for the coming year.

Goal One: **Worship Programming** – USSB will achieve and sustain excellence in worship programming, quantified by increased attendance at worship & increased percentage of membership attending worship.

- Develop worship offerings that are diverse, inclusive and explicitly welcoming to newcomers.
- Develop worship offerings that are attractive, meaningful and fulfilling for a wide range of ages.
- Integrate more (and a wider range of) voices into worship, including people of all ages.
- Integrate music offerings into the service in increasingly seamless and thematically appropriate ways.

Goal Two: **Music Programming** – USSB will achieve and sustain excellence in music programming, with priority on music in worship; quantified by phased development of music program & staffing.

- Diversify music offerings in worship and concert events to appeal to and support growing age diversity.
- Transition and develop programming to optimize resource of Adult Choral Director Position.
- Develop and Grow adult choral programs
- Addition of regular and sustained vocal and instrumental ensembles of all ages in worship services.
- Develop and Implement plan for major Sanctuary Sound System.
- Develop and Implement plan for chancel upgrade for accessibility.

Goal Three: **Membership Ministry** - USSB will experience an increasingly age diverse membership with growth numerically and with wisdom, strength, and involvement in USSB Programs.

- Develop and sustain the membership committee.
- Attract new members.
- Retain new members.
- Develop and sustain Connection Circle process
- Develop and sustain Affinity groups.

Goal Four: **Lifespan Religious Education** – USSB will achieve and sustain excellence in Lifespan Religious Education Programming with priority on children, families and youth; quantified by registration numbers, attendance numbers, number of trained leaders and numbers of volunteers.

- Develop Religious Education Leadership
- Sustain and evaluate Children’s Program
- Maintain and sustain Coming of Age Program
- Develop comprehensive High School Program
- Adult RE Program
- Establish sustained Lifespan Our Whole Lives sexuality program
Goal Five: **Social Justice** – USSB will achieve and sustain excellence in Social Justice Programming; quantified by numbers of members, friends, children and youth involved in church based social justice activities.

- Empower members and friends of the congregation, through participation in Social Justice actions and reflection.
- Increase USSB’s involvement in community inter-faith activity and leadership
- Increase USSB’s covenantal relationship with California Legislative Ministry.
- Develop USSB multi-generational service programs.
- Strategically Focus USSB outreach donations to enhance justice work and community collaborations.

Goal Six: **Pastoral Care** – USSB will achieve and sustain excellence in Lay Lead Pastoral Care Programming; quantified by the existence of specially trained lay led pastoral care team.

- Develop and sustain a lay-led team of volunteer care providers
- Provide care for members in crisis in need of practical, social, and emotional assistance.

Goal Seven: **Stewardship** – USSB will achieve and sustain excellence in Stewardship Programming; quantified by necessary resources—financial and facilities.

- Provide facilities that are functional, attractive and well maintained.
- Provide adequate support & resources for USSB programs.
- Create and maintain an effective paid & volunteer staff appropriately resourced to carry out the SLRP.

Goal Eight: **Ministerial Programs** – USSB will achieve and sustain excellence by developing an additional ministerial position at USSB and an environment that encourages UUA ministerial development, including ministerial internship.

- Complete the process for Call of Associate Minister
- Achieve and sustain excellence as a teaching congregation
- Inspire & inform USSB members to identify individual calls to ministry and ministerial opportunities
EXECUTIVE REPORT
2012-2013

Ongoing Monitoring vs. Annual Reporting

A note on language: you may notice words like “We,” “Our,” and “Us” throughout this report. For our purposes here, these kinds of pronouns refer to our USSB community as a whole, sometimes as it acts through representatives, like the Board of Trustees.

While we continue to produce Annual Reports, our Board is beginning to change the way it tracks the work of our ministry. Each month our Board tracks essential information, like financials, for example, while also reflecting upon and analyzing specific areas of ministry much more deeply on a rotating monthly basis, such as Membership, Community Life, Worship and Music, Social Justice, Pastoral Care, Religious Education, Stewardship and Planning. This better allows our Board to understand and influence the shape and direction of our ministry in many different ways, both in terms of depth and tactically, in real time, rather than at the end of the longer reporting cycles we’ve used until now. The change in language from “reporting” to “monitoring” is also significant. In the past our Board primarily reviewed reports about what had already occurred. Increasingly, our Board will monitor our ministry as it unfolds, measuring each dimension against the goals, or “ends” we have set for ourselves through policy and long range planning, which include benchmarks. The Committees (more and more frequently referred to as “Ministry Teams”) and Staff reports you may be familiar with still exist as source documents, and will be archived on the USSB website as well as in traditional paper archives.

Our annual report is organized according to the “Four Dimensions of Ministry”. The dimensions are:

- **Expression**: the way we use the worship, music, theatre and other arts to share and express our shared ministry in many ways.
- **Learning**: the way we grow and deepen through exercising our curiosity and engaging new ideas and concepts.
- **Action**: the ways we live our faith in the wider community, working to create a more just and loving world.
- **Connection**: the ways we grow and deepen through relationship with one another.

**The Hub**

“The Hub” refers to the organizational infrastructure that supports and makes possible our larger ministry. Administration, Governance, Communications, Finance, Stewardship, Staffing and Planning are examples of Hub activities. Programs, like Religious Education and Music, extend outward from the Hub like spokes on a wheel.
Charting Our Course Defining Our Governance: Our Board of Trustees has continued its multi-year efforts toward clarifying our organizational priorities and the underlying systems that will best help us achieve them. This year we completed a new process with the congregation to help us discern, articulate and update the sense of shared Mission (“why are we here?”) that undergirds all the work we do as a congregation. This work concluded with the congregation adopting our new Mission Statement: The Unitarian Society of Santa Barbara, and loving community of seekers; Living with Integrity, Nurturing Wonder, Inspiring Action! This was a robust conversation with our Board demonstrating extraordinary leadership! This mission statement most importantly provides the basis for ongoing programmatic and organizational planning. The Board has continued its discernment work to define governance philosophy to create the most efficient and inclusive system possible.

Our work is far from done and is beautifully supported by Laura Park of Unity Consulting (a UU organization).

Communications: An important “Hub” area of focus for the coming years will be the area of Communications, both internal and external. As our congregation grows, effective communication becomes at once more challenging and more important. Over the next two years we had hoped to implement a number of strategies to help us improve communications, including more focused staffing (as Communications does not currently reside under any one staff member) and technological upgrades, such as an improved database, website and social media presence. This progress is slowed due to budgetary constraints, yet we will continue to take “bite sized” steps to further this work.

Long Range Planning: We have extended our Plan through 2018, but only in broad brushstrokes. Because of the increased role the Board will play in visioning and long range planning as we transition to governance by policy, we are holding any significant modifications until the Board is ready to take up its expanded planning role in the coming year. While our Board of Trustees is not recommending any major changes to our LRP it at this time because we know that what we have learned through our Mission/Vision process will guide the Board’s planning, it’s important that our Long Range Plan remains synched with our 5 year Budget Planning Process, which extends to 2018. The Board’s next step with tying long range planning to our Mission will be establishing monitoring processes tied to the Ends that have been articulated by the Board. As a side note: thus far USSB remains highly successful at accomplishing virtually every goal we set for ourselves in the LRP.

Associate Minister: Our Hire to Call Transition: On May 2, our Congregation voted to Call the Rev. Julia Hamilton as our Associate Minister. Julia’s presence has brought great additional capacity to our ministry. As you read the sections of this report that fall under her portfolio (social justice, pastoral care, congregational life) the enhanced capacity she brings is significant. Given the enormous amount of good work happening in these areas, it’s hard to believe we’ve only had the Assistant Minister position for two years! The fruits of her labors are also becoming increasingly visible as programs “seeded” a year or two ago are now coming into their own in powerful ways.

- In the advance planning and creation of this position we established a variety of benchmarks (membership, attendance, member engagement, funding) to help us assess the extent to which adding the Additional Minister position is helping us meet our organizational goals. We have continued
progress toward all our benchmarks, and this year we completed the congregation Call of Rev. Julia Hamilton as our Associate Minister. Budgetary constraints necessitated that the board re-negotiate compensation and professional expenses from our original plan, and this includes restoration to plan within 2 years.

- One important difference the creation of the Associate Minister position has made may be less visible. Adding this position has made it possible for Rev. Aaron to focus on organizational priorities as and/or before they arise in a way that was not possible before Julia’s arrival, so we can be more tactically flexible and adaptable, in effect freeing up our Senior Minister so we can strategically “point” him as needed.

**Stewardship:** Through our Long Range Planning process, we define “Stewardship” as developing and sustaining the facility and financial and staff resources to meet the needs of our growing programs.

**Facilities:** We are truly fortunate to be stewards of a beautiful and historic physical campus. This year energy has been devoted to several major projects, as well as the usual day-to-day operations of a complicated facility!

- **La Paz and Arrellaga Properties:** Both of our rental properties have been fully occupied and generating revenue for the congregation that offsets the loan and interest expense reflected in our operating budget. All the structures require continual upkeep and have dated systems that benefit from the tender, loving care of our Building Manager!

- **Major Projects:** Maintaining this campus means ongoing projects! In addition to the ongoing maintenance and repairs, this year we proudly transformed two Blake Classrooms to Workshop Rotation Studios with the assistance of congregational work parties. We were also fortunate to be able to create Parish Garden renovation plans in three phases, and implemented phase one. Our Parish Kitchen now has a new grease trap. It is difficult to fully appreciate the significance of this statement, unless one fully understands what happens when commercial grease traps fail! Projects on our “wish list” for the coming year will need to be managed within our budget, and include Jefferson Hall Roof (and with some hard work and community collaboration and support of congregational leaders this project may include the addition of solar panels!), renovation of Blake Lounge and one or two additions to our Workshop Rotation studios.

- **Parish Garden Lighting and Table & Chair Rentals:** Through the entrepreneurial spirit of our Facility Use Coordinator, Celina Paul, and Building Manager, Rob Brown, along with a congregational work party, we now have Parish Garden Rental lighting and round tables and wedding chairs. These projects are paying for themselves through wedding event rentals, and have benefitted congregation activities such as our Auction, Great Tea, and potlucks!

**Financial Resources:** We are a fortunate congregation to have a depth and breadth of lay leaders, committees and staff to carry out the financial management that supports our vision and long range plan.
• **Stewardship Steering Committee:** This year we launched a Stewardship Steering Committee composed of 3 board members, 2 staff and 3 members at large. This committee is reviewing and advising our Board and Staff from a macro-view, cross programming and multi-year perspective.

• **Revenue Challenges:** This year our staff and leadership and congregation came together to address challenges to our operating revenue and shortfalls in our estimated member pledge revenues. This has carried forward into our budget planning for future years, and modifications in our staff allocations and long range plans for program development.

• **Our Annual Campaign:** was co-chaired this year by Susie DuPont and Craig Bennett. This campaign built on a multi-year approach that was introduced 3 years ago. Our fourth annual February presentation, this year titled “Fueling Our Mission”, resulted in over 220 members attending informational presentations about our congregation, that included and what we have accomplished and what support it will take for our future initiatives. Our conservative estimate of pledges for the coming year has fallen short of our $560k goal, and we will continue to work toward this goal in the coming months. Our Stewardship Steering Committee will help us review and analyze our congregation wide response to annual campaigns over the past several years.

• **Fundraising:** We executed another successful Fall Fundraising Auction and Congregation Celebration. The event this year held revenue and contributions steady, with an increase in the number of attendees, number of households making purchases and an increased number of new members in volunteer positions. This event was supported by an amazing and robust volunteer planning committee-a dream team-Chaired by Peter Hale. Our event for 2013 is already being planned and will be chaired by Gun Dukes. This committee will kick off in July for our October 12, 2013 event! This year we continued an organizational favorite....the Women’s Fashion Fling, led by Sally Hamilton. And with the help of Celina, Facilities Use Coordinator held a pilot spring concert series, and initiated our Silvergreen’s Sunday lunches.

• **Maximizing Facility Revenue**-Our Facility Coordinator position is well established, and Celina Paul has yet again competently extended our outreach efforts to maximize our facility revenue. We continue the delicate balancing of keeping up with our congregation program needs! This means we will focus on the greatest revenue potential with the least conflict with congregation use. This year we hosted a Wedding Vendor event that was well attended and presented our campus as a wedding and reception site to many diverse professionals. We have also seen an increase paid use of our facilities by other non-profits in our community.

• **Clergy Housing Assistance Fund:** The important fund is established, funded and ready to be utilized when our Senior Minister is ready to proceed with the purchase of a home. This is an “evergreen fund”, meaning that principle and simple interest will be returned to the fund upon sale of the home or completion of a ministry, to be used into perpetuity by the congregation for this purpose.

• In the reports that follow you will appreciate the comprehensive management by our Treasurer, Finance, Audit, and Planned Giving Committees and Endowment Board.
Leadership development: We continue the transition with our Nominating Committee becoming a year round Leadership Development Committee (see separate report). A concrete outcome is our Path to Participation pilot program this March that is being evaluated now and will be offered 3-4 times next year.

Membership: The Membership Ministry is comprised of the 17 wonderful committee members, led by Sally Hamilton, who work with our 1/3 time Membership Coordinator and Rev. Julia Hamilton. This year, we said goodbye to Nica Guinn and hello to Becca Claassen as our Membership Coordinator and the transition has gone smoothly. At our August retreat we chose to rename ourselves the Membership Ministry Committee. This change from the Membership Committee encourages our members to focus on our participation as part of our personal spiritual path and not just as the chores done by committee members. We invite people to our committee who enjoy meeting people and creating fellowship events and who represent our congregation with outgoing sincerity.

We have experienced a stabilization of our membership growth in numbers, following four years of significant growth. In order to maintain this in a healthy and sustainable way, we will continue to prioritize our membership programming. Coming out of a year of growth and innovation, this year our membership ministry continued the focus on sustaining the work of welcoming new people into our congregation and deepening the engagement of members. Overall, a strong membership ministry continues to pay off in high levels of engagement with all aspects of congregational life.

- Sunday Morning “Superstar” Volunteers: We celebrate our first full year working with this system for Sunday morning volunteers and it has been going very well. Each Sunday of the month (including 5th Sundays) there are 1st service and 2nd service teams working with a Team Connector. Over 100 volunteers have signed up to participate in ushering, serving coffee, greeting, and being at the Welcome Table. Thank you to everyone who helped make this transition into a more sophisticated and yet easier-to-manage system.

- Growth: We have welcomed 44 new members so far this year, (compared to 48 last year) and have welcomed 275 new members in the past 5 years. This recent year our membership number stabilized with 512 members at the time of this report. Our five year growth continues to reflect that that we are also growing much faster than our denomination as a whole. Our total membership is now 512 compared to 521 in June 2012, compared to 506 in June 2011, 469 in June 2010 and 435 in June 2008.

- Membership Benchmarks: Our Long Range Plan has a number of initiatives that are geared toward meeting the needs of a congregation growing in health, vitality, programs and membership numbers. To support those initiatives we have created benchmarks in membership numbers, donor households and giving levels. Our progress toward our membership benchmarks for the number of members and for pledging households is on course, and did slow in the recent year. Through the efforts of our talented Budget Planning Committee we are now utilizing exponential moving average projections (in 7 and 13 year time periods) more accurately monitor and project membership growth, membership pledge contributions, operating expenses and operating revenue.
• **Membership Retention:** Of the 275 new members who have joined in the past 5 years, 214 or 78% are still members at this date. This continues to reflect a very healthy number of new member retention! This number compares to 86% last year (over 4 years). A significant variance this year is that 16 of the members who resigned moved geographically, (37%) vs. leaving the congregation or dying—which we correlate to the younger age of many of our newer members.

• **Age Diversity:** Our congregation continues its efforts to become significantly more age-diverse; 16% of our membership is now under the age of 45 compared to 15% in 2012, 16% in 2010, and compared to 2007, when 12% of our membership was under the age of 45. In 2007 we had 44 members under the age of 45; we now have 56 members under the age of 45. Of the new members who have joined in the past 5 years, 29% are under 45. (This compares to 28% last year and 24% two years ago). We continue with particular attention focused on programming for youth and young adults and young families in order to continue and sustain this age diversity.

• **Membership Ministry:** There is now a fully developed, three-step process for welcoming and integrating newcomers. The twice-monthly Guest Orientation welcomes visitors with an informal short meeting during social hour. The bi-monthly Getting Acquainted class, led by Rev. Hamilton, is a 1.5 hour introduction to USSB and provides a chance to get to know other newcomers. Path to Membership, led by Rev. McEmrys, is a monthly, 3 hour class that provides a more in-depth conversation about Unitarian Universalism and membership here at USSB. We experimented with the Path to Membership schedule, resulting in fewer classes this year, but have returned to a once-monthly meeting. Our new Path to Participation class is the “next step” in leadership development and membership connection.

**Expression**

*the way we use the worship, music, theatre and other arts to share and express our shared ministry in many ways*

**Worship:** In addition to Sunday morning worship, this year we have also made significant progress toward integrating worship throughout the week:

• **Alternative Worship:** The two “new” worship services we’ve launched in the last two years are now strong, stable and well-supported. The first is Standing Outside the Season, a Christmas-week service designed to help people whose relationship to the Holiday season is complicated or painful. Our monthly Taize service, which is a mid-week service built around simple, meditative singing and silence also remains strong, offering spiritual nourishment to people within and, increasingly, outside of, our congregation.

• **Multigenerational Worship:** this year we launched a new “Family Chapel” series of worship services designed specifically for multi-generational families. Children and adults worship together in highly interactive services that help people “go deep” within their own family, while also strengthening connection between families.

• **Wellspring Wednesday:** our Worship Committee continues to offer unique, high quality worship opportunities as part of our adult RE program.
**Collaboration** continues to be an important part of our worship life. Congregants regularly collaborate with Ministers and Ministers with one another, as we also bring in gifted collaborators like the Santa Barbara Children’s Chorus, Celtic harpist Patrick Ball and outstanding UU composer, Jason Shelton, who worked with our choirs and collaborated with Rev. McEmrys to create a new song of Thanksgiving just for us!

The vitality and quality of our worship services ends another year on a high note: as measured by the most important predictor of successful worship – attendance.

- **Attendance:** This year our average Sunday attendance held relatively level at 291 compared to 304 the previous year. Our average total in 2010 was 270. The average adult attendance held steady at 235 this year compared to 236 last year. Our first service is full to capacity most Sundays, and we need to continue to work on improving attendance in our second service, which is the only place we have some room left to grow. These numbers do not include our mid-week service offerings and it is also important for us to continue exploring various mid-week worship offerings, as we are nearing full capacity on Sundays. We continue to record a significant attendance by visitors, and newcomers. We range 10-35 visitors each month (identified by their completion of guest forms), with an average of 18 new individuals added to our visitor roster each month and an average of 8 visitors attending a guest orientation every month.

- **Attendance as Percentage of Membership:** Annual reporting for June 2013 is 512, with average attendance of 291 with 57% attendance relative to membership. According to best-practice literature, the most important leading indicator of a congregation’s relative vitality and health is Sunday morning attendance relative to total membership. The target threshold for California congregations (across denominational lines) is 56.6%. Annual reporting for June 2008 membership was 435, with average attendance of 208 and 47% attendance relative to membership. Annual reporting for June 2010 membership was 468, with average attendance of 270 and 58% attendance relative to membership. Annual reporting for June 2011 membership was 506, with average attendance was 302 with 60% attendance relative to membership. Annual reporting for June 2012 membership was 520 with average attendance of 304 and 58.5% attendance relative to membership. In this report we talk about percentages a lot. As we grow in number, each percentage point represents a larger number of people, and is thus more significant. Maintaining the percentage of attendance becomes an increased and achievable challenge that we will continue to pay particular attention too in prioritizing our organizational resources in the coming years.

**Music Ministry:**

- **Staffing:** In January, 2012, we increased the FTE of our Choir Director from .50 to .75, a year ahead of schedule. This staffing level is most often seen in congregations significantly larger than USSB (sizes of 550-700). We did this as an experiment, wondering if “staffing for growth” might help us attract more participants to our choirs and ensembles than one would typically find in a congregation of our size. We have established benchmarks to evaluate sustainability and progress in our music program, and, over the last two years, find that we continue to have participation levels and range of offerings typical of the 500
member congregation we are. We are therefore moving our Choir Director position back to the .50 FTE that is standard for a congregation like ours.

- **Ensembles and Instrumental Music:** In addition to the wonderful offerings of the Chancel Choir and Woman’s Choral, we continue to offer outstanding ensemble music. Our Drumming Corp continues to develop, our “Garage Band” greatly adds to our rock ‘n roll capacity and our Men’s Chorus, which has been led by Robin Montz is a splendid addition to our musical palette. The rich use of duets, trios and other small singing groups that has so enriched worship would not be possible without the tireless and enthusiastic efforts of our dedicated singers and instrumentalists under the inspiring direction of Choir Director, Ken Ryals. A great deal of our music program’s success is also due to the efforts of our volunteer staff, especially the members of our Music Committee. Because so much of their work happens “offstage,” many of us may be unaware of the incredible service they offer our congregation – but the truth is we would be lucky to achieve half of what we do without their generous gifts of time and talent.

The Arts:

- **“Outside-In”:** Almost all our arts programs use an organizational approach we call “outside-in.” These are programs we deliberately open up to our surrounding community so we have a good mix of USSR and non-USSR participants. This is both a good outreach strategy for USSR and a good way to better serve our wider community.

- **USSB Theatre Group:** This program is now beginning its fourth year under the leadership of volunteer staff member Paul Freeman. Following a well-received “radio” production of Dickens’ classic A Christmas Carol, we are developed and performed another “radio” show, this one with a Halloween theme, featuring eerie family-friendly stories by Edgar Allan Poe and Oscar Wilde. This show was very well by audience members and people who listed at home on the “radio” as well!

- **SB Children’s Choir:** This affiliated group is beginning their third year, under the direction of Paul Freeman. This year we have started making real progress in our partnership as more of “our” children join the program. SBCC joined us on Earth Day this year, offering smiles and songs that helped our service reach higher ever.

- **Film Nights:** Our monthly film nights facilitated by member Chuck Wolfe continue to be a highlight for many, and are now connected to our monthly worship themes or justice efforts.

- **This year we also collaborated with Pacific Pride and the Boxtails theatre company on a special process through which young members of the GLBT share life-changing stories with GLBT Elders. Boxtails theatre artists then worked with participants to turn those stories into a theatre performance.**

- **SPAN Film Series:** Our Seventh Principle Action Network group works tirelessly on climate change issues. One dimension of their work has been to offer a film-series that is open to USSR members and the wider community. The films they show are important, thought provoking, and often very hard to find. This year hundreds of people from our wider community have attended these showings and the inspiring, though-provoking discussions that follow.
• **Just for Fun-Painting Group:** This group is a fine example of an affinity group led by members and integrating the arts into our spiritual growth.

**Spiritual Practice:** Our Taize musical-meditation services most definitely fall under the rubric of spiritual practice and this year we increased our Taize-style offerings to one/month instead of the two or three times per/year we’d been offering in the past.

**Rose Window Media:** In the fall of 2010 the Board of Trustees authorized a pilot project of the publication of *After Aesop*. The strategic goal of the Rose Window Media is to extend the reach of our ministry. In December 2011 the first copies of *After Aesop* had arrived and we had learned a great deal about what is takes to get a project that far. Now we are learning about marketing, order fulfillment, and how far the reach and influence of such a project can go. We already know that ministers and directors of religious education and using the stories all over the country and at UU Western Regional Assembly we heard direct and impactful stories of the influence of this project in our wider UU community.

*Connection*

*the ways we grow and deepen through relationship with one another*

**Our Larger Faith**

• **UUMA CENTER:** *(Unitarian Universalist Minister’s Association Continuing Education Network for Training, Enrichment, and Renewal)* Rev. Aaron is Co-Chair of CENTER, the body responsible for providing professional development and enrichment opportunities for Ministers. In addition to his leadership duties, he also oversees the development of peer-mentoring and coaching programs.

• **PSWD Musician Network Choral Festival:** This year for the first time USSB choirs participated in the Unitarian Universalist Musicians Network District Choral Festival held at Pacific Unitarian church in Palos Verdes, California.

• **Unitarian Universalists for Jewish Awareness:** After winning in 2012, this year Rev. Aaron was one of three sermon judges for the Jerry Davidoff Sermon Award.

• **General Assembly:** Rev. Aaron will co-lead a workshop with theologian Anthony Pinn and ethicist Sharon Welch about the intersection of spirituality and activism.

• **Regional Assembly 2013:** The first Western Regional District Assembly was held in San Jose, CA in April, 2013. Five members of USSB attended, and Nancy Edmundson co-led a Courage and Renewal Workshop to a full house about Circles of Trust work based on the work of Parker Palmer and applications in congregations and for religious professionals. Hers was the best attended workshop on Saturday afternoon and was very well received. Five USSB members attended the assembly and helped to staff our After Aesop vendor table.

• **Fahs Collaborative/UU College for Social Justice:** Rev. Julia is playing a key role in the shaping and curriculum design of the UU College for Social Justice, a new national organization designed to help UU Activists develop the tools they need to change the world. Rev. Julia has been working with *The*
Fahs Collaborative as part of a curriculum development team for the College of Social Justice, preparing people for experiential learning on service trips nationally and internationally.

- At the second annual Walking the Walk conference for justice leadership training in CA (hosted by the UULMCA) Rev. Julia co-led a workshop with Glenna Matthews, UU historian and biographer of Thomas Starr King.
- UU Legislative Ministry, CA: Rev. Julia continues to serve on the Board of this statewide organization, working on the Strategic Planning team and continuing her commitment to fostering civic engagement, public witness, and social justice leadership among UUs.
- At the second annual Walking the Walk conference for justice leadership training in CA (Hosted by UULMCA) Rev. Julia co-led a workshop with Glenna Matthews, UU historian and biographer of Thomas Starr King.

Connection Circles: Our Connection Circles continue to be a strong presence in the life of our community, with 100 participants, 14 facilitators and 10 groups. Approximately 20% of our members participated in the program this year, which is coordinated by volunteer staff member Carol Schwyzter. The impact of these groups can be profound. As one member said, "The practice of deep and respectful listening without responding at these Connection Circle meetings calms my mind and I always leave more relaxed and with a peaceful easy feeling. Hearing everyone sharing their life stories makes me feel a part of the human story because there are so many commonalities of emotion and experience. Somehow I find this comforting."

Connecting With Each Other: We continue to find new ways to connect with one another, whether by participating in a spontaneous outing organized through the “Just For Fun” activities, or by attending some of the events organized around a particular topic, affinity, or activity.

- Just For Fun is the umbrella for ongoing, casual events, like a beach walk or garden painting, as well as one-time gatherings open to any interested members.
- We have partnered with the Alliance for Living and Dying Well, hosting conversations about end of life care using the Five Wishes template.
- This year we celebrated more than seventy of our elders aged four-score years or more, at The Second Great Tea, an afternoon of elegant pastries and sandwiches, live music, and (of course!) tea.
- The semi-annual potluck and variety show has been a big hit, filling Parish Hall to capacity, thanks to the great work of our Membership Team and the incomparable master of ceremonies, Ken Ralph and DJ Larry Trager.
- Each month, our membership committee reaches out with an “anniversary” phone call during the month members signed the book, however long ago that might be. This is a way to keep in touch with our entire membership on a regular basis.
- Super Star Sunday Volunteer Teams: this year we completely changed the way we “staff” our Sunday mornings! We trained and launched five teams (thanks, team leaders: Florence Michel, Megan Moyer, Teri Stelzer, Ted & Nancy Meyers, Gary Welterlen), who help coordinate the efforts of more than 100 people! Sunday morning takes a community.
Our Annual Fundraising Auction and Congregation Celebration continues to be a vehicle for connecting events through the year for our members and friends.

Young Adults: This year has seen a new wave of visitors and members in their 20s and 30s. To make it easier for them to “find” one another, we’ve been hosting regular brunches for young adults (ages 18-40) after the 11:00 service on Sunday mornings. This summer we will be taking this a step further with our new “Pints & Ponderings” program, where young adults will meet in casual social settings (like a pub, for example) for fellowship and reflection.

Silvergreen's Lunch Dates: This year we have begun hosting congregational lunches at Silvergreen’s. In addition to providing opportunities for USSBers to share a meal outside our walls, it also raises funds for our congregation.

USSB at UCSB: Many of our members work at UCSB. This year, thanks to the leadership and initiative of Laura Bushnell, they have formed a group which meets monthly for lunch and conversation on campus.

Seasoned Seekers: has met for untold years and is actively seeking new leadership.

The Alliance: While a separate organization, the Alliance is a significant program for connection here at USSB. See separate report.

Retiring Programs: Part of the normal cycle of program life includes the retirement of programs when the participation, impact on furthering our long range plan and leadership evolve. This year we have retired Game Night and the Prayer Group.

Pastoral Care: Caring for One Another

The USSB Care Team: Now in its second year, the USSB Care Team consists of six trained members working with Rev. Hamilton. They have been commissioned by the congregation to provide a caring, compassionate response to members in times of crisis and transition. They have a confidential hotline that can respond to requests for care within 24 hours. The congregation has been quick to embrace this ministry, and the Team has offered much needed supportive presence and a listening ear to dozens of people this year. As part of their development this year the team has engaged in training around issues of addiction, LGBT concerns, spiritual practice, and cultivated ongoing personal reflection with Rev. Julia Hamilton.

Pastoral Care Network: The Care Team works with the existing Pastoral Care Network of individuals who are available to provide rides, meals, and other practical help.

Pastoral Counseling: Rev. Hamilton and Rev. McEmrys provide one-on-one counseling and pastoral support.

Addictions Ministry Team: Our addictions team is now completing its first full year. In that time they have achieved all the goals they set for themselves when they began work last year. We host weekly AA-affiliated “We Agnostics” group and have developed a “first responder” support for those who are helping need of immediate support. The goals of this ministry team are: To raise awareness about addiction, in all its forms; to develop, and make available, resources on addictions and recovery for the
USSB community; and to provide meaningful support to those in the congregations suffering from the effects of addictions.

**Childcare for Programs:** A continued initiative this year, tied to our priority of age diversity, is offering childcare to specific programs. We continue to experiment with various models to best accomplish this important objective. Unfortunately we will not be able to offer as much childcare as we would like due to budgetary pressure.

**Lifespan Learning**

*the way we grow and deepen through exercising our curiosity and engaging new ideas and concepts*

**Children’s Religious Education**

- **Registration and attendance:** This year both registration and attendance are up 20%, making this our third consecutive year of growth in this program. The generous offerings of more than 60 committed volunteers makes our outstanding programming for children, youth and adults possible.

- **Children’s Play:** This year we offered a third annual winter holiday play, adapted and directed by Rev. Julia, in collaboration with the Santa Barbara Children’s Choir.

- **Workshop Rotation:** We have just completed our first year of “workshop rotation.” Each “class” runs for 8 weeks, with children deeply engaging with a “Master Story” aligned with our larger “parish themes” each month, rotating through Music, Story, Movement, Science, Theatre and Visual Art learning environments. This change reflects our commitment to teaching to multiple intelligences and multiple senses. So far we have converted two of our classrooms into interactive learning studios, and plan to convert the rest when our budget allows. Our prioritized need is a technology upgrade in Jefferson Hall. Second priority is renovating Classroom D in much the same fashion as the art and science studios. Feedback from teachers and learners of all ages has been overwhelmingly positive, and we look forward to implementing what we have learned this year to make our children’s program even better.

**Our Whole Lives Sexuality & Values (OWL):** This year we offered two OWL programs: Junior High Level to our 8th and 9th graders and the elementary program to our 4th and 5th graders. Both sessions of OWL were a huge success. We now boast ten newly trained OWL facilitators. Elementary program facilitators are Lora Barnett, Scott Barnett, Kelly Bedard, John Hartman, and Sarah Hough. Our Junior Senior High program facilitators are Ken Ralph, Kirsten Zecher, Andrew Rose, Charla Bregante, and Chrissie Cable. Next year we will be offering both the Elementary OWL and Junior High Owl programs. Training these new facilitators was an investment of leadership development funds that will secure the OWL program for a number of years.

**Youth Programs**

**Coming of Age:** this year long program is well established in our congregation and serves our 8th grade youth, and attracts and retains families with youth. This year, instead of Coming of Age being a year-long program,
upon consulting with long-time COA facilitators we decided to offer a January-June program instead. October through December our 8th grade youth participated in the Our Whole Lives program. Attendance and engagement in the program—for youth, parents, and leaders—has remained high.

**Young Religious Unitarian Universalists (YRUU)** Under the leadership of Youth Coordinator, Adam Shive, our high school youth program, continues to offer rich, challenging, welcoming space for teens. Last year our youth embarked on our first-ever multigenerational service trip to the Hopi and Navajo Nations. This June YRUU will travel to the Bay Area where they will connect with the Faithful Fools program—a street outreach to the homeless. Next year our hope is to return to the Navajo and Hopi reservations.

**Adult Religious Education:**

- **Adult Religious Education Committee:** Our successful and well-functioning committee has supported the fourth year of Wellspring Wednesdays, one of the most successful programs in our ministry.

- **Wellspring Wednesday Program:** This program was added four years ago and represents a significant addition of Religious Education programming with a focus on community building. Attendance during our two Wellspring Wednesday semesters is consistent with a high number of our young families and new members participating. In 2012-13, 238 participants enjoyed a rich variety of classes.

**Action**

_The ways we live our faith in the wider community, working to create a more just and loving world_

**Social Justice: Caring for Others:** We are called to live out our values in the world and work toward the greater good. As we renew our commitments, we are moving toward a model of justice and outreach work that embraces both action and reflection, linking the work we do within ourselves to the work we do in the world.

- We continue our support for the **UU Legislative Ministry, California.** In addition to raising funds, Rev. Julia has served as a member of the Board and a new group is forming to take full advantage of this partnership and the resources it offers.

- **SPAN: Seventh Principle Action Network** got started this year, grounded in the principle of the interconnected web. This group has formed a steering committee and is committed to connecting our actions with our faith and our spirit, as well as providing concrete opportunities for the congregation to work toward social and environmental change. Looking for new ways to organize, this first year has been an exploration of how to best achieve significant and yet complex goals. The group hopes to lift up the ways all our concerns are connected as we strive to create a more just and sustainable society.
  - In November, the group hosted a “Seventh Principle Fair”, inviting everyone who had a passion for justice to come and share their work with one another.
  - Screenings of the films “Gasland” and “Chasing Ice” drew large crowds, as did a community forum on fracking.
  - On Earth Day, SPAN members brought attention to the proposed Keystone XL Pipeline project.
Rev. Aaron launched the **Blue Boat Conversations** to begin to engage our creative thinking around the issue of climate change.

The congregation will be considering a **Resolution on Climate Change** at this year’s annual meeting.

**GLTBQ Equality.** We continue to be a strong voice for equality in Santa Barbara and a trusted partner for community organizations like Pacific Pride. Our Candle of Commitment in support of marriage equality continues to be lit every Sunday, although we eagerly await the Supreme Court ruling this summer! Rev. Julia spoke at an equality rally at the Courthouse, was invited to lead a Q&A following the screening of “Call Me Kuchu” at the *OUTrageous Film Festival*, and has organized our presence at the Harvey Milk Celebration and the Pride festival.

We responded to the problem of **Gun Violence** in our community with a moving service in honor of the Newtown shootings, and Rev. Julia gave a blessing at a public forum hosted by the **Coalition Against Gun Violence**. Our “prayer rope” has traveled to a service the Live Oak UU congregation as well as the CAGV event.

**Immigration:** Rev. Julia attended an interfaith meeting with congresswoman Lois Capps about mobilizing in support of immigration reform as well as offered a prayer at an immigration reform vigil on May 1st. We have hosted undocumented students from UCSB as part of a Sunday worship service and a Wellspring Wednesday class on this issue.

**Spirituality and Activism:** Rev. Aaron will co-lead a workshop with theologian Anthony Pinn and ethicist Sharon Welch about the intersection of spirituality and activism.

**Community Capacity and Coalition Building: Our community partners:**

**Interfaith Worker Justice:** Rev. McEmrys continues his work on the Board of Directors of Interfaith Worker Justice and continues his leadership on the timely concerns of economic justice.

**CLUE:** Rev. Hamilton serves on the board of CLUE, Santa Barbara (Clergy and Laity United for Economic Justice) and their Immigration sub-committee, as well as hosting the annual Board retreat at USSB.

**UU Legislative Ministry CA:** Rev. Hamilton serves on the Board for the UU Legislative Ministry, CA.

**Pacific Pride:** We have a close relationship with our partners at Pacific Pride. In addition to rallying members of the faith community, we provide a space for press conferences and important community events regarding LGBT equality.

**Congregation B’nai Brith:** Rev. Julia participated in a moving multi-faith Holocaust Remembrance service and Rev. Aaron participated in a pulpit exchange with Rabbi Steven and. This included our choral programs second outreach effort with the B’nai Brith Congregation Choir. In the service at Congregation B’nai Brith (CBB), our choirs sang in Hebrew and Aramaic. The following Sunday, the CBB Choir sang at both of our services.

**Child Victims Act:** Rev. Aaron has been working with other community leaders in support of SB 131, the Child Victims Act. If passed into law this bill will lift the far too low statute of limitations to help adults who were abused as children get social justice and to make the children of the future safer.

**Fund for SB and SB Foundation:** Rev. Julia, Rev. Aaron & Nancy engage with community partners like the Fund for Santa Barbara and the Santa Barbara Foundation to explore how this Congregation can
continue to serve as an incubator for projects like the Warming Center and the Clean Green Fund that benefit our wider community.

**Unitarian Universalist Fund for Social Responsibility:** This past year USSB received a grant of $20,000 to support the operating costs of the community organizing work done by our staff related to our Freedom Warming Center activities. We were unable to apply for a third continuation year for the grant, yet will re-apply for a new grant in September as we apply our learning and coalition building to new justice projects and integrate Habits of the Heart based on the work of Parker Palmer into our congregation and community collaboration work.

**Starr King Parent Child Workshop:** Our sponsorship and collaboration with Starr King Parent Child Workshop and SB City College continues to be an important ministry in the life of our congregation. (See separate report from SK PCW). Just this month our Board Task Force created to document the history and relationship submitted a full report to the board after a full year of work. We also entered into facilitated conversations between leadership of both USSB and SK PCW to help us identify and address communication challenges that had developed over the past 4 years related to rapid change in both organizations. We held listening circles, facilitated by Rev. Julia Hamilton to create a forum for USSB members to express concerns and to help provide accurate information and dispel anxieties created by misinformation and incomplete communications.

**The 9/11 Sister Cities performance:** We reestablished an artistic relationship with the Sister Cities concert for 9/11 which originated in our sanctuary years ago. The concert was held at the Faulkner Gallery of the Santa Barbara Library where our choirs performed before a packed house that included Mayor Helene Schneider. USSB was well represented, well received, and was lauded with a standing ovation.

**Interfaith Thanksgiving service:** This year was the first in many years that our choirs participated in the Interfaith Thanksgiving service at First United Methodist Church.

**Tibet Week:** We hosted an international gathering of Tibetan Buddhists who spent a week creating a "Wheel of Life" mandala. There were numerous public events and public viewings throughout the week which brought hundreds of people into our church. On Martin Luther King Day, we collaborated with our Tibetan sisters and brothers on a USSB worship service and the opening ceremony of their mandala creation process. After the opening ceremony, many of us joined them for a silent march protesting the continuing genocide of the Tibetan people and their culture by the Chinese government. We invited them to join us for a shared meal at Wellspring Wednesday, which was followed by a guided mandala viewing for USSB members. In CRE, Peter Hale guided our children in the creation of their own sand mandalas, using our rose window as their template. Rev. Aaron's MLK/Tibet sermon from that day has since been widely shared in Tibetan Buddhist/Activist circles in North America and beyond. USSB built strong and ongoing connections that week, and accrued significant goodwill in the broader community.

**Freedom Warming Centers:** Rev. Hamilton has provided public testimony to the county on behalf of the Warming Centers, and worked with Nancy Edmundson in maintaining strong relationships with our public-sector partners. Now in its fourth year of operations, we continue to serve as the fiscal agent and organizing body for this county wide, interfaith program, which provided shelter on 48 cold and rainy winter nights this
last year. Our partnerships have expanded to include more organizations in more communities as well as Doctors Without Walls, Salvation Army and EasyLift. This expansion was welcome, not only for the collaborative relationships we are building but because we nearly doubled the number of guests we served, welcoming 4,182 people county-wide. We continued for a second year with our two part-time Coordinators, Maria Long and Ed Wesson, who brought both experience and new skills to the work of making sure the centers were staffed, supplied and ready to open when the weather conditions were met. Here at USSB, we opened our doors as shelter 17 of the 48 night, sheltering 959, supported by our 50+ volunteer food team cooking delicious and hearty meals for our guests, the youth continued their practice, the choir sang for guests on Christmas Eve and our entire congregation pitched in creating hygiene kits during community hour one Sunday morning. Funding the Warming Centers continues to be a public and private partnership, matching privately raised funds to city and county dollars. Over the next few years, we hope to enable the Warming Centers to become a fully self-supporting organization that can sustain itself for as long as it is needed in Santa Barbara County. As separate report includes more details.

**Giving it Away:** Although our Sunday Outreach Offerings were suspended halfway through the year due to budgetary concerns, we still donated nearly $18,000 to 10 different causes locally, nationally and internationally. We collect food as well as money for the SB Foodbank, and gifts as well as funds for families affected by domestic violence through our partnership with Domestic Violence Solutions. We continue to raise money for Kiva Microcredit and, of course, the Freedom Warming Centers, housed both organizationally and physically here at our congregation. Our denomination is stronger because of our support of the UU Legislative Ministry, CA.

**Courage and Renewal:** We continue to integrate the Circle of Trust principles into our congregational life and programming as well as our community collaborations. We are truly fortunate that our congregation membership includes three Circle of Trust Facilitators prepared by the Center for Courage and Renewal, Ken Saxon, Susan Plummer and Nancy Edmundson. Their experience and leadership helps to ground our program development and encourage a growing number of our congregation to participate in this work both within and beyond our congregation. This represents a growing capacity with trained facilitators and those in our congregation who have experienced Circle of Trust Retreats. Currently, Rev. Julia and five other USSB members the year-long Befriending the Unknown program, grounded in the work of Parker Palmer. In the coming years we will be integrating Circle of Trust principles and practices is our next step of circles based small group ministry, and will extend beyond our current Connection Circle program. This is also a rapidly emerging community ministry as we are being contacted by other faith communities in SB about our Circle work, and this year began a three year pilot program to integrate Circle of Trust work into Warming Center activities, named “Warming Circles.” At the same time, Rev. Aaron is also instrumental in UUMA CENTER beginning to integrate Circles of Trust into UU clergy professional development nationwide.

**Our Facilities in Service:** In the past year USSB has hosted events for the SB Improv, Numerous Choirs/Ensembles (including SB Children’s Choir, SB Master Choir, Revels Rehearsals) AHA! Teen program,
Exploritas/Road Scholar, SB Fielding Institute, SB Graduate Institute, Find for SB, Tibet Week, SB Dental Hygienists Association, Al Anon, SB Ski and Sports Club, UCSB Lectures, CEC film events, SB Folk Dance, SB Summer Stock and other Children’s theatre programs, the Foodbank of SB County and County of SB Vulnerability Index for Homeless.

**Community Collaboration for Youth:** We have continued to expand our collaboration of Academy of Healing Arts to take full advantage of the youth served in service projects to USSB. For the third year, this spring AHA set up our Library Booksale with all the “heavy lifting.” Saving USSB funds and sore backs! We co-sponsored a popular summer film series in 2012 and AHA! Offered a Social Media Safety program to our USSB families.

Submitted Faithfully in Service to Our Congregation:
Rev. Aaron McEmrys, Parish Minister;
Nancy Edmundson, Director of Administration,
Rev. Julia Hamilton, Assistant Minister
# MINISTRY & PROGRAM Listings

## Action Ministry Teams
- 7th Principle Action Network (SPAN)
- Children's Social Justice Sundays
- Hunt for Justice
- LBGT Welcoming Congregation
- Mission Trip Fundraising
- OutReach Collections
- SPAN Resolution Task Force
- Starr King Parent ChildWorkshop Partnership
- UU Legislative Ministry of CA
- Warming Center Fiscal Agency
- Warming Center Hospitality
- AHA! Academy For Healing Arts Partnership

## Expression Ministry Teams
- Annual Choral Retreat
- Annual Choral UUMN Festival
- Chancel Choir
- Drumming Group
- Taize Services
- Family Chapel
- Flower Committee
- Garage Band
- Holiday Play
- Interfaith Thanksgiving Service
- Men's Choral
- Multi-generational Worship
- Poetry Café
- Radio Plays
- Standing Outside the Season
- Worship Associates
- SB Children's Choir Partnership
- After Aesop-Rose Window Media

## Connection Ministry Teams
- Connection Circles
- Addictions Ministry
- Alliance
- Annual Fundraising Auction
- Annual Stewardship Campaign
- Bookgroup
- Childcare for Programs
- Concert Program
- Congregation Potlucks
- Day of Dead Fiesta
- Guest Orientation
- Holiday Craft Party
- Just For Fun
- Lunch at Silvergreens
- Membership Committee
- Parent Support Group
- Parent’s Night Out
- Pastoral Care Network
- Path to Membership
- Pints & Ponterings (3x5)
- RE End of Year Picnic
- RE Kick-off Carnival
- RE Spring Fling Open House
- Seasoned Seekers
- Sunday Superstars-Hospitality
- The Great Tea
- UCSB UU's
- USSB Care Team
- Women's Fashion Fling
- Women's Group
- Chalice Circle Celebration Event
- USSB Artist Show
- Camp DeBenneville Fall Retreat

## Learning Ministry Teams
- Adult Religious Education Team
- Book Stall Ministry
- Children's Religious Education
- Coming of Age Program
- Getting Acquainted
- Lending Library
- Our Wholes Lives (OWL Sexuality/Values)
- Path to Participation
- WellSpring Wednesday Program
- Young Religious UUs (YRUU-High School)
- Lark’s Yoga

## Supporting It All Ministry Teams
- Annual Auction & Celebration
- Annual Stewardship Campaign
- Audit Committee
- Board of Trustees
- Finance Committee
- Kitchen Leaders
- Office Volunteers
- Planned Giving Program
- Stewardship Steering Committee
- USSB Endowment
- Video & Sound Support Team
- Congregation Meetings & Town Meetings
- Long Range Planning
- Governance Transition
- Committee on Shared Ministry
BOARD OF TRUSTEES REPORT

As seen in all the sections of this 2012-2013 Annual Report, it has again been a very active year for the Unitarian Society of Santa Barbara. The nine members on the Board of Trustees have worked hard, with massive monthly meeting agendas and task force assignments providing opportunity for leadership growth to support the work of our beloved community.

Using our new Mission statement as a focus, here are some special highlights of the past year.

Living with Integrity:
This year has brought up many questions about the state of the relationship between the Starr King Parent Child Workshop, hosted on the Unitarian Society Campus, and the USSB. Since the New Year, the USSB board and staff have worked hard with the Starr King leadership to right relations between our organizations. This was often difficult work, but we used our heads and our hearts to clarify our challenges, committing to direct, open and honest communication through identified channels, with the help of a skilled facilitator and loving guidance from our Rev. Julia. Now we can move forward with shared good will to focus on our future work together.

Nurturing Wonder:
The “Journey of a Lifetime Begins Here” is a fountain of wonder. LeeAnn Williams, Tracey Goforth and all the volunteers for Workshop leaders and Journey Guides have given the congregation an exciting new paradigm of religious education for our children. This program nurtures wonder not only in the participating children, but maybe even more so in the volunteers. “The best thing I did all year,” commented trustee Melinda Staveley about her experience as a Journey Guide.

The Board’s work to understand and articulate the values and dreams of our community based on the rich information collected through the Appreciative Inquiry seemed quite overwhelming at first. But the work to discern our values and mission also nurtured wonder. For two days in our Board retreat, ideas were dancing around, inspiration was at fever pitch, and all trustees were fully engaged. It was a spiritual moment when we arrived at the Mission statement we later proposed to the congregation.

Inspiring Action:
Rev. Julia Hamilton’s arrival two years ago brought great additional capacity to our ministry in many areas but especially social justice action, community inter-faith activity and leadership. And members were ready to take action! The Seventh Principle Action Network is up and running. The Annual Meeting is voting on A Resolution on the Climate Crisis which affirms our resolve to actively engage this issue. The resolution confirms our obligation to put our faith into action. The USSB is on the move!

With our clear values and our Mission, the Board will continue its work on establishing a good governance system here at USSB that is effective, that clarifies roles and accountabilities in realizing our mission, and that
liberates and empowers all our leadership in pursuit of our mission. The congregation has elected nine strong leaders to carry out this work. I urge the congregation to actively engage in the work of the Board.

Gun Dukes, President, Board of Trustees

NOMINATING-LEADERSHIP DEVELOPMENT COMMITTEE

Members: Don Bushnell, Anna DiStefano (Chair), Mary Ellen Hoffman, Carol Schwyzer, Terri Stelzer, and Gary Welterlen

The Committee met monthly to develop a list of names for consideration and cultivation for leadership positions of various kinds in the congregation.

Committee members also met with members of the Board and Ministerial Team, individually and collectively, to assist with the establishment of Board priorities, process observation of Board meetings, and coordination of leadership recruitment activities. The Chair also met with the Board President, the Chair of COSM, and the Senior Minister to clarify roles and responsibilities of our various groups.

We wrote several articles about leadership for the Kaleidoscope and organized an initial meeting of a new initiative, “Path to Participation” which we hope to continue in the coming year. We also outlined a new Wellspring Wednesday offering through which leaders from local community organizations will share their expertise with members of the congregation.

Respectfully submitted, Anna Di Stefano, Chair Nominating Committee

Financial Management

TREASURER REPORT

The Treasurer is part of our team that includes our Director of Administration, our Bookkeeper, the Finance Committee, the Endowment Committee and the Audit Committee. The USSB Board of Trustees and the Finance Committee receive monthly reports on our financial condition and the status of expenditures to budget. Variances that may occur are managed to ensure that annually budgeted and approved resources are sufficient and planned spending levels are maintained.

In addition to ongoing review of the financial operations of the Society, the Treasurer participates at monthly Finance Committee meetings and quarterly USSB Endowment Board meetings, as well as serving as a consultant to the Audit Committee, Finance Committee, and the Budget Planning Task Force. The Treasurer
and the Director of Administration work closely together, as often as needed, to insure that the financial matters of USSB are monitored and managed.

The financial reports for the fiscal year ending 6/30/13 will not be closed for several months. During the latter part of this fiscal year, we were faced with a revenue challenge. There was a call to the congregation to help fill this gap, with some success. The Budget Planning Sub-Committee has been working with a more reasonable financial model to help avoid the revenue gap happening for this upcoming fiscal year. The Minister and the Director of Administration have been in the process of evaluating the expenses to re-calibrate our expenditures to our projected revenues.

The Treasurer of the Unitarian Society of Santa Barbara is one of several officers authorized to sign checks (two signatures are always required). It appears that internal financial controls are in place, with guidelines provided by the CPA.

Respectfully submitted, Kathy Leer, Treasurer 2012-2013

FINANCE COMMITTEE

It is the responsibility of the Finance Committee to insure that monies are spent in accordance with the Society’s annual budget, to provide the Board with advance notice and advice when unusual financial conditions arise, and to monitor the overall fiscal health of the Society. Finance Committee Members are appointed by the Board of Trustees for three-year terms. Members of the Finance Committee take their charge seriously, and we attempt to provide the Board with timely, accurate information to make the best possible decisions for all members of the Society.

In addition to its monthly review of the Society’s operating and capital budgets, the Finance Committee provided input and recommendations to the Board on financial aspects of several topics during the year, including the financial considerations of calling our Associate Minister, fiscal agency and fundraising for the Freedom Warming Centers, financing of our recent real estate acquisition, and advising on designation of several bequests. The committee also provided input to Board of Trustees dashboard reporting and provided a team to offer policy input for the Clergy Housing Assistance program.

Continuing members of the Finance Committee for the fiscal year July 2012 - June 2013 were Rick Hibbs, (Chair), Gun Dukes (President), John Chere, Roger Horton, (Associate Treasurer), Bart Millar (Board), Kathy Leer, (Treasurer), Ted Stern, and Linda Liker. Rev. Aaron McEmrys participates ex officio; Director of Administration Nancy Edmundson and Bookkeeper Cindy Young provide superb staff support to the committee and attend meetings as a non-voting members. The committee normally meets at 4:00 pm on the Wednesday preceding the third Tuesday of each month. Meetings are open to Society members.
The Budget Planning Subcommittee meets from January through March. The BPSC implemented more accurate exponential moving average projections of expenses and revenues and presented a balanced annual Society budget. BPSC also creates a five-year budget projection to give the Board a longer view forward. A May mid-term meeting updated the projections needed for reorganization decisions. The 2013 BPSC members were Nancy Edmundson (Director of Administration), Rick Hibbs (Chair), Aaron McEmrys (Senior Minister), Bart Millar (Board of Trustees), John Gilbert, (At-large) John Chere, (Finance), Kathy Leer, (Treasurer), Glenn Bacheller, (At-large) and Scott Barnett (Shared Ministry). BPSC presented its work to the Board in March; in May the Board approved a balanced budget for FY13-14, subject to congregational vote at the June annual meeting.

The Chair expresses his thanks for hard work, well and enthusiastically done, to all the committee members.

Respectfully submitted, Rick Hibbs, Chair

AUDIT COMMITTEE

The Board appointed Audit Committee members for the FY 2012-13 were Ted Stern, chair, John Gilbert, Patricia Reilly Stark, Kathy Leer and Melinda Staveley.

A full audit of the books and records of the Society and the Endowment was performed by Larson & Ridge LLP. On Sept. 10, 2012, Tom Ridge presented his draft of the audit of the Financial Statements of USSB for the year ended June 30, 2011. It was acknowledged that this audit was the product of a protracted process due to the need to review unaudited interim statements for the previous two years and to conform to recently enacted changes in audit standards. This process resulted in the auditor's unqualified opinion as to the fairness of the financial statements and to note that there were no disagreements with management.

The Audit Committee reviewed the report and recommended it to the Board for acceptance which it did. Copies of the financial statements and Audit Committee minutes are available from the Director of Administration, Nancy Edmundson.

On February 20, 2013 the Committee reviewed, amended and recommended to the Board the unaudited financial statements for the year ended June 30, 2012 and the associated notes. Patricia introduced and the Committee recommended to the Board the implementation of UUA Best Practices in a new UUA Handbook for 2013-2014 on Ministerial Compensation and Housing. Ted Stern’s service on this committee termed out this year and the Board subsequently re-appointed Mike Noling to the committee as chair.

Submitted by outgoing Chair, Ted Stern
ANNUAL CAMPAIGN

The 2013-14 Annual Campaign is co-chaired by Craig Bennett and Susie DuPont with a lot of assistance from many others including: Aaron McEmrys, Nancy Edmundson, Julia Hamilton, approximately 40 volunteer stewards and numerous other people who helped develop the Town Hall Presentation, shared testimonials with the congregation, made phone calls, wrote letters, created artwork, helped with mailings, answered questions in the courtyard, and penned thank you notes. This is certainly a team effort! Our Annual Campaign supports both ongoing operations and helps build financial capacity so that the Society can achieve its 5-Year goals.

Campaign Overview: So far, 85% of those who pledged last year and 22 new pledges have been received and 45% of those have increased their giving. Those who have increased their pledge did so by an average of 23%. Steps are currently being taken to conclude the campaign as quickly and effectively as possible. Our Annual budget included three possible goals: a conservative goal of $560,000 that will not put us where we want to be; a preferred goal of $600,000 that would allow us to preserve our programs; an aspirational goal of $630,000 that would move us along with a full staffing plan and the addition of programs. On May 20 campaign leaders and senior staff analyzed our conservative campaign projections and reviewed these with the Budget Planning Committee and Finance Committee. Based on information available, the 2013-2014 budget will be based upon $520,000 in member pledges which puts us well below our lowest campaign goal. We will continue our campaign efforts, and hope that we may be able to adjust this number upward over the next few months. That will depend upon the collective generosity and responsiveness of our congregation.

Key strategies utilized for this campaign have included:

- A compelling vision of what the Society can be.
- Our Ministers’ articulation and communication of our Mission, Values, and Vision.
- Strong support and participation by the Board of Trustees.
- An education presentation and accompanying brochure giving members a better understanding of where the Society is, where it is going and how we all can help get there.
- Committed members who shared their commitment and reasons for investing financially in our congregation in Sunday services and in videos.
- Weekly emails including these videos along with a pledge reminder.
- A large and committed team of Stewards who met personally with as many members as possible (approximately 160 households) and made follow-up reminder calls to an additional 150 households over the course of two evenings.
- A May 12 deadline to motivate timely pledges.

We thank all of our members who have made their pledges for their timely responses, and we especially thank all of the member volunteers who have given of their time and connections in this campaign.
ENDOWMENT FUND

Endowment Fund (Fund) is a separate corporation, and its directors receive, hold, and administer bequests and gifts for the benefit of the Unitarian Society of Santa Barbara. These gifts are intended for long-term investment and for providing future cash payments to the Society for operations costs, while preserving or increasing the assets of the Fund.

In 2012 and year to date thru May, 2013, the Endowment Fund has received most generous gifts of $58,000 from the Smallwood Estate, $43,000 from the Mary Chubb Estate, and $276,000 from the Peter and Ruth Pocock Estate.

As of December 31, 2012, the value of the total assets of the Fund was $847,454. Fund assets had a total return of 15.3% in 2012, net of the approximate 6% annual distribution to the Society. As of March 31, 2013, fund assets were $958,755. During this first quarter, Fund assets had a total return of 8.4%. And as of May 15, 2013, with the addition of the Pocock gift, the Fund assets totaled $1,254,416.

Since the Fund’s inception in 1983, it has received gifts and bequests of $1,040,432. (the Fund’s principal). In 2012, the Fund distributed $45,915 to support the Society’s operating needs. These distributions were in the form of two semiannual payments to the Society, each equal to 3% of the average “working asset value” over the prior two years.

Assets are invested in an allocation of Vanguard equity and bond index mutual funds and the Ariel Appreciation Fund, a socially responsible mutual fund. The specific fund investments and their performance are reported to the USSB Board quarterly and report copies are available from the Director of Administration.

Current directors of the Endowment Fund are: Jeff Carmody, Kathy Leer, Mike Noling, and Ted Stern. Kathy Leer serves as a director in her capacity as Treasurer of the Unitarian Society. The directors, assisted by the Director of Administration, Nancy Edmundson, meet at least quarterly to review and approve the Endowment reports to the Board, and to review the status of the funds and to consider changes. Directors are appointed annually by the Board of Trustees of the Society and may not serve for more than two consecutive three-year terms.

Any member or friend interested in the financial support of our Society is encouraged to make a contribution at any time and/or to include the Endowment in their estate plan and be welcomed into the Chalice Circle for recognition. A Planned Giving program, described elsewhere in the annual report, facilitates anyone interested in supporting our Society through the Endowment Fund and provides a variety of tax-advantaged ideas for making contributions.

Submitted by Chair, Michael Noling
PLANNED GIVING ADVISORS

Our USSB Planned Giving program is aimed at helping all of our members and friends in two important ways. - First to assist and encourage each of us to plan ahead and get our affairs in order by setting up an estate plan that will assure that your remaining resources go to those that matter most to you and not to pay unnecessary taxes. - And second, the program encourages including in your estate plans those groups that matter a great deal to you and leaving a legacy to those groups. Hopefully that includes this congregation. All those that do so, are members of the Chalice Circle. They are listed later in this report.

We also recognize the Planned Giving Advisors listed below who have volunteered to provide guidance to our members in arranging for estate plans, health care proxies and planned gifts. The USSB Planned Giving Program is guided by Policy Guidelines and Principles approved by the Board. Advisors are appointed by the Board. The Advisors are eager to assist the congregation with information, guidance and referrals to attorneys who are expert in the field of estate planning. Planned Giving brochures and materials are available from the Director of Administration, Nancy Edmundson.

In 2012 and year to date thru May, 2013, the Endowment Fund has received most generous gifts of $58,000 from the Smallwood Estate, $43,000 from the Mary Chubb Estate, and $276,000 from the Peter and Ruth Pocock Estate.

So the Advisors share a common dream… that all our members and friends will have an estate plan, and each of us will find something, however large or small, to put in that Estate plan to remember this congregation. We encourage all our members and friends to embrace this dream and become Chalice Circle members!

Some ninety current USSB members are included in the Chalice Circle. All have found it possible to include the Unitarian Society or our Endowment in their estate plans. The congregation thanks all for leaving a legacy for future generations of UUs.

Planned Giving Advisors,

Anita Blume               Chris Casebeer               Anna DiStefano               Gun Dukes
Edmundson                 Bruce Hanna               Dick Jensen                  Nancy
Mike Noling, Chair        Susan Plumber              Patricia Reilly              Colin Jones
Ted Stern                 John Warnock               Gary Welterlen               Ken Saxon
The Chalice Circle

Providing Strength and Stewardship to the Society for Generations to Come

Nancy & Jerar Andon
Beverly and Chris Appleton
  Pat Aptaker
Amy and Glenn Bacheller
Anita Blume & Ken Ralph
Don Bushnell and Julie Lopp
  Jeff and Sue Carmody
Chris & Teriana Casebeer
  Carnzu Clark
Ken Collier & Anne Anderson
  Dick Cousineau
Lex & Ginny Crane
  Lowell Dabbs
Jared Dawson & Kathleen Boehm
Anna DiStefano & Deb Karoff
  Gun Dukes
Nancy & Alan Edmundson
  Bob and Pat Fulmer
Donnis Galvin & Peter Hale
  John & Ilse Gilbert
    Helen Gordon
      Jane Gray
    Mary Grimm
      Ilse Hance
      Bruce Hanna
Beverly Sheldon Hanna
Mark and Sally Hamilton
  Gloria Hendley
Mary Ellen Hoffman
  Dorothy Holland
Roger & Eileen Horton
Richard & Bonnie Jensen
  Jean & Ivor John
Colin & Joanie Jones
  Barbara Kane
Joan Livingston
Donald & Barbara Margerum
  Ann Marshall
Aaron & Eliza McEmrys
  Donnie Nair
Paul and Joanne Nay
  Marianne Nelson
Mike & Betty Noling
  Laurie Potter
    Patricia Reilly
    Ellen Rockne
      Ken & Jo Saxon
      Carol Schwyzner
      Joya Sexton
      Jack & Judy Stapelmann
        Ted & Kay Stern
Doug and Jody Thomas
    Jeanne Thornton
    Linda Van Buren
John & Dorothy Warnock
Gary & Debbie Welterlen
  Jules Zimmer
Anonymous Gifts
  USSB Gifts
The Chalice Circle

Estate Members

Providing Strength and Stewardship to the Society for Generations to Come

Ruth Adams Estate
Billings Estate
Dorothy Boothe Estate
Larry & Fran Brundall Estate
Charles Brown Estate
Elizabeth Buell Estate
Mary Chubb Estate
Roy and Laurie Cummins Estate
DeArriaz Estate
James DeJuren Estate
Eichorn Estate
Peter Foot Estate
Benjamin Frank Estate
Mildred Frisbee Estate
Margaret Getman Estate
Charles W. Hague Estate
Edith Johnson Estate
Genevieve Junger Estate

Al & Betty LoMele Estate
Harriet Miller Estate
Vivian Mohr Estate
Marlene Neushel Estate
Northman Estate
Bob Pinkerton Estate
Pocock Estate
Schmidhauser Estate
Julie Schneideman Estate
June Schuerch Estate
William P. Sheehan Estate
David Smallwood Estate
Minna E Smith Estate
Gladys Swackhamer Estate
Mary Lou Thompson Estate
Sam Wake Estate
Affiliated Organizations

THE ALLIANCE

This has been an interesting and successful year for the Alliance. Our programs have been enthusiastically received and attendance has increased. This has helped us achieve the UU goals of community support and charitable giving. Dorothy Warnock chaired our active Program committee with both entertaining and enlightening events, which ranged from Marty Blum’s discussion of SBCC’s problems, Ken Ryals’ musical talents, to Jared Dawson’s bird talk, along with many more unique speakers.

Our endowments’ investments continued to accumulate, so we were able to make contributions to worthy causes. The Alliance gave $4000.00 to the Ministerial Housing Fund, $1000.00 to the Library, $50.00 to Willbridge, $50.00 to the Foodbank (because it provided food to the Warming Center), $100.00 to the Warming Center, and $5000.00 to the Church Budget Shortfall Fund. Anita Ralph is our Treasurer.

In November, we repeated our drive to collect gifts for the troops in Afghanistan. Additionally, we supported the UU Women’s Federation. Publicity Chair, Rita Shaw did an excellent job interviewing each speaker and then writing program notes which she sent on the various Unitarian venues to remind everyone of the meetings.

The Alliance has helped to strengthen our church community by providing a special Place for fellowship on the first Fridays of each month at 2:00 P.M. in Parish Hall and by contributing to important causes.

Clair Chytilo, Chair 2012-2013
ACADEMY FOR HEALING ARTS
No report submitted in time for Annual Report publication

AHA! is a non-profit that is dedicated to the development of character, imagination, emotional intelligence, and social conscience in teenagers. Through an innovative curriculum focusing on self-expression, team-building, empathy training, emotional intelligence, and diversity appreciation, AHA! helps teens learn to set goals, stop bullying and hatred, support their peers, and serve their community.

The curriculum is delivered through a multicultural lens that honors and celebrates our commonalities and differences. Facilitators participate with the teens in lessons and exercises that enhance both group trust and cross-generational alliances.

The USSB campus has served as an afterschool and summer meeting site for the program since January 2005. The AHA teens have assisted with special USSB projects each Fall and Spring.

SANTA BARBARA CHILDREN’S CHORUS
No report Submitted in time for Annual Report publication

Santa Barbara Children’s Chorus (SBCC) is a county-wide, non-denominational music education and performing organization for children ages 8-14. USSB and SBCC entered into an agreement to deliver children’s music programs to USSB families and the community starting in January 2011.

To learn more about Santa Barbara Children’s Chorus, call Paul Freeman, (805) 512-9840, or visit sbchildrenschorus.com.

FREEDOM WARMING CENTERS

The mission of the Freedom Warming Centers is to provide a safe, dry and warm place to sleep for people without shelter when extreme winter weather is forecast for Santa Barbara County. The Unitarian Society, with the direction of Nancy Edmundson and Rev. Julia Hamilton, acts as the organizing force and fiscal agent for this grassroots effort. The Warming Centers are a last resort for the unsheltered homeless. Sobriety is not a requirement and we accept anyone regardless of his/her physical or mental health. For many of our guests, traditional shelter is not an option. The only thing we ask is that guests remain calm and respectful. Guests who are not able to find shelter in our warming centers will eventually seek shelter in business doorways, our emergency rooms and jails. When they DO NOT find shelter, they risk death and suffering due to illness or hypothermia.

This year, we coordinated sites in downtown Santa Barbara, Isla Vista, Goleta, Carpinteria and Lompoc and Santa Maria, with Goleta and Carpinteria opening for the first season. Our USSB food team of over 50 volunteers, coordinated by Emmanuelle Ledbetter and Lisa Moreno, served meals for anywhere from 50 to 80 people (increased from 15 to 55 last year!) each night we were activated. This year we often opened two sites downtown to meet a growing need, sheltering nearly 100 people on some nights in Santa Barbara alone.

Across the county, we were open 48 nights and served a total of 4,182 guests in Lompoc, Santa Maria, Isle Vista, Goleta, Carpinteria and Santa Barbara including emancipated foster youth, mentally ill, physically disabled, those with chronic terminal illness, handicapped and wheelchair-bound, unemployed, underemployed, safe parking program participants, dual diagnosed and substance abusers, those just released from jail, senior
citizen’s, and veterans (Afghani, Iraqi and Vietnam). Increase of 32% served over last year; and 13 additional nights.

2012-2013 we provided 4,182 beds in 48 nights.
2011-2012 we provided 2,858 beds in 36 nights (50 night Lompoc)
2010-2011 we provided 1,736 beds in 35 nights.

The Centers were started four seasons ago after the death of a homeless man, called “Freedom” here in downtown Santa Barbara, and they rely on a collaboration and partnership between individual volunteers, faith communities that act as host sites, public funding from the County and the cities of Santa Barbara and Goleta, private donations, paid staff, and other nonprofits that work with people on the streets. We have made great strides in improving both the day-to-day operations of the Freedom Warming Center program as well as increasing our partnerships.

Our supporting organizations this year include: The Good Samaritan Shelter in Santa Maria, and Lompoc, the Korean United Methodist Church, St. Michael’s, and the Student Religious Co-Op in Isla Vista, Trinity Episcopal Church, First United Methodist Church, First Presbyterian Church, The Santa Barbara Jewish Federation, Unity Church, First Congregational Church in Santa Barbara, the PEO United Methodist Women’s Alumni, and the Santa Barbara Friends Meeting. We collaborate with Doctors Without Walls, a volunteer street-medicine team who provides basic medical care and evaluation to our guests, Salvation Army and with EasyLift, a van service that provides wheelchair accessible rides to our guests who cannot walk to our host sites. This network of relationships across interfaith lines, in political circles, and in the non-profit and advocacy world can serve as a model for future projects of this nature.

Our efforts have concrete results. Overall deaths among people living on the streets have decreased by 25% since 2009, and the warming centers have played a key role in this decline. See the news report on KSBY: http://www.ksby.com/videos/homeless-deaths-down-in-santa-barbara-county/

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**STARR KING PARENT CHILD WORKSHOP**

Starr King Parent-Child Workshop (SK) is completing another successful year, with continued support of Santa Barbara Community College, Continuing Education Division and the Unitarian Society of Santa Barbara. SK continues to provide an exemplary parent education program to families in Santa Barbara. We maintain our commitment to uphold the original mission established by founder and Unitarian member Sarah Foot, to provide opportunities for parents to develop parenting and leadership skills. Parents also learn the importance of bringing about positive societal changes through community involvement and advocacy. SK also provides children with a healthy, safe and stimulating learning environment.

**Special thanks to the Unitarian Society of Santa Barbara (USSB)**

We appreciate the collaboration and continued success in achieving our mutual goals. The Unitarian Society of Santa Barbara’s community outreach effort via Starr King, an exemplary social justice model, is something of which both organizations can be proud.
Generations of families have developed a strong supportive community fostering values of inclusion, diversity, acceptance, advocacy, creativity and conflict resolution – a natural overlap of Unitarian values.

USSB / SK Relations - In the hope of clarification, several meetings have been scheduled for dialogue and discussion regarding this long-term relationship. SK is particularly appreciative of the April 24th joint board meeting when the SK board was reassured by USSB board representatives of its continued commitment to SK by suggesting scheduled opportunities during the year for ongoing communication and transparency. A special thanks to Kristen Sneddon, SK Board Chair and Gun Dukes, USSB Board President who worked very carefully to promote improved relations.

Population Served
Sixty-three (63) families and seventy-four (74) children were served this year, including 5 sets of twins.

Financial Assistance
Ten families received financial assistance.
In addition, families facing personal, health, and family crisis were assisted via the network of family support, which besides financial assistance included meals, childcare, transportation, and fulfillment of workday requirements.

SBCC – Current Memo of Understanding between SBCC and Starr King will stand for Yr. 2013 – 2014.

Fall Enrollment 2013
We are currently enrolling for the Fall 2013 and have several openings. For a tour please contact us at 966-1325.

Parent Curriculum (SBCC CE Division)

Fall Term: Parent Ed. In a Cooperative Preschool Setting – Child Development – An Overview for Parents
Winter Term: Parent Ed. In a Cooperative Preschool Setting – Parent / Child Relationships
Spring Term: Parent Ed. In a Cooperative Preschool Setting – Family Education and Resources

Children’s Curriculum
As stated in our philosophy, SK continues to provide “an atmosphere where children can be curious, may experiment and construct for themselves an understanding of the environment of objects and relationships they find themselves in. Parents and staff are available for help, support and response.”
The fall and winter terms provided a great deal of wonder and discovery for all. New children enjoyed the open ended and free spirited experiences while the returning children enjoyed building on previous learning and experienced SK’s traditional events like the costume parade, harvest feast and candle-making.

Weekly Guest Musician – SBCEO Special Ed. student comes to SK to play music with the children every Monday morning. She is wheelchair bound and accompanied by an LVN and Charla Bregante, Vocational Assistant who is also SK alum and current USSB member. This new relationship is a mutual gift for both the Special Ed. student and the children, their parents and staff.
General Maintenance
Thanks to our collaborative efforts, together SK and USSB offer a wonderful environment for both the SK and USSB children. The safety of all children is well worth the investment and maintenance of the attractive environment we share.
We replaced the old wood working table with a custom built one by Roberto Orozco’s uncle. The gardens are constantly being enhanced and provide both beauty and bounty.

Afternoon Program
Bonnie Kerwin, Head Teacher and Christen Barajas Zampeze, PM Teacher make a great team and together they are able to meet the needs of families who otherwise would not be able to attend SK during the morning program without the benefit of afternoon care. During the second part of the year Christen assumed the role of Head Teacher with Elubia Orozco as Teacher while Bonnie took a personal leave of absence.

Early Childhood Education (ECE) Student Intern
Parents established the Hanne Sonquist and Rachel Johansen Endowment Fund to honor Hanne and Rachel upon their retirement. Its goal is to offer early childhood education students an opportunity to learn the importance of parent cooperative programs and implement these values in their future teaching careers. This year Elubia Orozco received her practicum experience at SK. In addition, we also hosted student interns from Santa Barbara Charter School, Open Alternative School and Antioch University.

Annual Rummage Sale
We are saddened by the USSB decision to no longer host the annual rummage sale. Changing location of the rummage sale will be a challenge for all including the hundreds of regular attendees. Unfortunately there was no opportunity for jointly problem solving the challenges for USSB in advance of the decision. However, the decision has been made and we respect it. We also understand and appreciate the challenges and adjustments USSB has made in the past with regard to the rummage sale. We appreciate the opportunity to have one more year of rummage at USSB to enable us to notify the community and to transition to a new space and problem solve logistics.

SK plans to continue to provide the annual rummage sale and we will secure a new location for Rummage 2014. The rummage sale for SK is much more than a fundraiser. It is an exercise in environmental practices while building community and giving back. After rummage, many other charitable organizations benefit as well.

Jointly both organizations have made a huge difference in our environment and in our community through the annual rummage sale. We are thankful to the Unitarian Society and extend a heartfelt expression of gratitude for the generosity for so many years. We look forward to further collaboration in the future.

Yolanda Medina Garcia, Directo
USSB CALENDAR
2012-2013
(Year in Review)

July
- Charting Our Course Conversations
- Children’s RE Summer Sundays
- True Spark Film Series with AHA!
- UU Legislative Ministry Forum

August
- Congregation Potluck and Hoe Down
- Work party to Create Workshop Rotation Studios
- Family Chapel Launch
- Connection Circles Sign Ups
- Board of Trustees Planning Retreat
- Religious Education Teacher Training

September
- CRE Workshop Rotation Launch
- Children’s RE Program Kickoff Carnival
- 9/11 Commemoration Choral Performance
- Connection Circles Resume Year 3!
- DeBenneville Pines Retreat
- OWL for Youth Launch
- RE Parent’s Night Out
- Ingathering Worship Service & Water Communion
- Connection Circle Facilitator Training
- Membership Committee Retreat

October
- Fall Session Wellspring Wednesdays
- Radio Play “A Dark and Stormy Night”
- Men’s Vocal Ensemble Launch
- Annual Fundraising Auction & Celebration
- Light bulb Work party!
- Alliance for Living Well, Dying Well Dinner
- Alliance for Living Well, Dying Well Films
- Starr King Rummage Sale
- Dia de los Muertos Service & Multigenerational Craft Party
- Town Meeting on Draft Mission and Values
- 7th Principle Networking Fair
November
Heritage Sunday
New Member Recognition & Luncheon
Freedom Warming Centers Open for the winter season
Town Meeting on Draft Mission and Values
OUTrageous Film Festival USSB co-sponsor
Jeremy Ben-Ami, “J Street” USSB co-sponsor
Jason Shelton Workshops & Collaborative Worship
Thanksgiving Service & Bread Communion
Interfaith thanksgiving Service USSB Choir Sings
All Congregation  Hygiene Packs for Warming Centers

December
Second Family Chapel
Town Meeting on Revenue Challenge
Holiday Craft Party
Children’s Holiday Play, third Annual
Special Service Responds to Gun Violence
SB Children’s Choir Holiday Performance
Master Chorale Holiday Concert
Standing Outside the Season Service
Christmas Eve Services

January
SPAN Film Series
Tibet Week at USSB
Winter Session Wellspring Wednesday begins
Coming of Age Wizard of Oz
Common Ground Vulnerability Index Survey
Choir Retreat
Social Media Safety Workshop

February
Congregation Vote to Adopt Mission and Values
Congregation Potluck and Dance Party
SUPER Pals Program
BoxTales Theatre Program with Pacific Pride
SPAN community forum on Fracking
Community Forum: High Cost of Gun Violence
Dances of Universal Peace
SK/USB Listening Circle
Multigenerational Purim Service

March
Mid-year Congregation Town Meetings Annual Campaign
Launch of Annual Fundraising Campaign
Poetry Café
Silvergreen’s Fundraising Events Launch
Fundraising Concert
Path To Participation Class Launch
Blue Boat Future Project Conversations
Drumming Corp Launch
Flower Communion Service
Parish Garden Upgrade Work Party
6th Annual Foot Washing for the Homeless
Easter Services
April

Fundraising Concert
Spring Wellspring Wednesday Session begins
Town Meeting on Vote to Call Associate Minister
Library Used Booksale
Earth Day Worship Services
Proposed Congregation Climate Change Resolution Introduced
Coming of Age Quest
UU Western Regional Assembly

May

Vigil for Immigration Reform
Congregation Vote to Call Rev. Julia Hamilton, Associate Minister
New Member Recognition & Luncheon
Chasing Ice Film Night
PSWD Musician Network Choral Festival
Women’s Fashion Fling

June

Youth Sunday, Coming of Age and Bridging Services
Town Budget Meeting Annual Congregational Meeting
The Great Tea, Second Annual
SK/USSB Listening Circle
Town Meeting on Proposed Budget
RE Teacher Recognition & RE Carnival
Annual Meeting
YRUU Mission Trip
Fire Communion Service
RE Summer Sundays Begin
UU General Assembly

Regular Classes & Events

Women’s Group  Yoga  Esperanto Circle
Connection Circles  Reading Group  Just For Fun Activities
Early Morning Exercise  Toastmasters  Principled Recovery

Monthly Events

Path to Membership  Alliance General Meetings
Taize Services  Seasoned Seekers
Film Nights with Chuck Wolfe
Core Values of the
Unitarian Society of Santa Barbara

We, the members and friends of this congregation, value:

1. The mutuality of caring and responsibility that sustains this community.

2. Respecting differences of belief, lifestyle and sexual identity.

3. Welcoming everyone into the life and work of this congregation.

4. Ritual and celebration that invite the sacred into our daily lives, and which unite us in good times and in difficult times.

5. Working for peace and social justice.

6. Lifelong learning and growth as individuals and as a community.

Covenant of Good Relations

In my interactions with others in this congregation, I will:

1. Be receptive, listening with care and compassion.

2. Be truthful, speaking with care and compassion. Speak directly to any person(s) with whom I have a concern.

3. Be committed to the group as a whole, honoring our long history as a congregation within the Unitarian Universalist tradition.

4. Expect that there will be differences among us and accept and care for one another despite those differences.

5. Remain engaged with gentleness and respect when times are uncertain, participate in the process, and do my part to sustain this Covenant.

6. Honor my responsibility for upholding the spiritual values, traditions and rituals of our community.
Thank You Warming Center Volunteers

This season (our fourth!) the Freedom Warming Centers were activated for 48 rainy and cold nights between November 15 and March 31. Our volunteer hospitality teams were on-call to provide a warm, tasty meal and help our guests get settled for the night here at USSB. The names of these volunteers are presented in the “word cloud” below, with many thanks and appreciations for what you do! While most of us were indoors, you were working in the cold and rain to make sure that the most vulnerable of our neighbors on the streets have a dry, warm place to sleep and a full belly before bedtime. You cleaned up the next morning, you worked on short notice, you prepped and froze food in advance. Special thanks are due to our Hospitality Coordinators, Lisa Moreno and Emmanuelle Ledbetter, and to those who were the on-call Team Leaders: Carol Schwyzer, Joe Fior, Charla Bregante & Miles, Tammy Shorb. We make a difference here in Santa Barbara!

Help us reduce our paper use. Please return this report to the office when you are finished. The report is available on our web site: www.ussf.org.

Thank you