ANNUAL REPORT
UNITARIAN SOCIETY OF SANTA BARBARA

Living with INTEGRITY
Nurturing WONDER
Inspiring ACTION
Our Values

Community • Courage • Love • Diversity • Generosity • Joy

Our Mission

The Unitarian Society is a loving community of seekers

Living with Integrity • Nurturing Wonder • Inspiring Action

Our Covenant of Good Relations

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

• Be receptive, listening with care and compassion
• Be truthful, speaking with care and compassion
• Speak directly to any person(s) with whom I have a concern
• Be committed to the group as a whole, honoring our long history as a congregation within the Unitarian Universalist tradition
• Expect that there will be differences among us and accept and care for one another despite those differences
• Remain engaged with gentleness and respect when times are uncertain, participate in the process, and do my part to sustain this Covenant
• Honor my responsibility for upholding the spiritual values, traditions, and rituals of our community
Please note: this document is presented as a work in progress.
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Unitarian Society of Santa Barbara

Notified Agenda for Annual Meeting
June 3, 2018 at 12:30 PM in Parish Hall

1. Opening and Call to Order, Chalice Lighting             Keith Strohmaier, Board President
2. Collect Ballots                                      Keith Strohmaier, Board President
3. Additions/Deletions from Agenda if 20% of membership present Keith Strohmaier, Board President
4. Affirmation of Covenant, Core Values, and Mission, and Ends Keith Strohmaier, Board President
6. Year-to-Date; Year Ahead                             Rev. Julia Hamilton & Rev. Caitlin Cotter Coillberg
8. Board Linkage; Mission, Vision, and Ends             Keith Strohmaier, Board President
9. Election of Nominating Committee                     Susan Plummer, Board Vice President
10. Election of Board of Trustees                       Carol Schwyzzer, Nominating Committee
11. Honor Outgoing Board of Trustees Members            Rev. Julia Hamilton
12. Installation of Board of Trustees and Nominating Committee Rev. Julia Hamilton
13. Vote to Adopt Fiscal Plan                           Onolee Zwicke, Treasurer
14. New Business (additional agenda items)               Keith Strohmaier, Board President
15. Closing                                             Rev. Julia Hamilton
16. Adjournment                                         Keith Strohmaier, Board President

Voting Information

Members who have signed the membership book on or before May 3, 2018 and committed to an annual financial contribution are eligible to vote. (Members may also receive ministerial exemption from financial commitment.)

Absentee ballots will be available on request by calling the office at (805) 965-4583, between services on Sunday May 13 and Sunday May 27, or at our Town Hall meeting.

Members may vote by proxy. Each member attending the meeting may hold one proxy. Proxies should be dated, signed, and state the name of the member to carry the proxy.

The quorum for an annual meeting is one-tenth of the membership counted as present, or voting by proxy or absentee ballot.

Official Voting Membership at Meeting Notice: 418
Quorum to conduct business: 10% of total membership: 42
Quorum to make additions or deletions from Agenda: 20% of total membership: 84
Board of Trustees 2017-2018

Officers
Keith Strohmaier, President
Susan Plummer, Vice-President
Bonnie Lassen, Secretary
Onolee Zwicke, Treasurer

Board Members
Craig Bennett, Eileen Bunning, Jack Rief, Chris Shorb, Cheryl Snell

Board Terms
Term ends June 30, 2020: Chris Shorb, Jack Rief, Cheryl Snell
Term ends June 30, 2019: Craig Bennett, Susan Plummer, Onolee Zwicke
Term ends June 30, 2018: Eileen Bunning, Bonnie Lassen, Keith Strohmaier

Nominating Committee Terms
Term ends June 30, 2018: Tracy Freeman, Colin Jones
Term ends June 30, 2019: John Hartman, Carol Schweyzer
Term ends June 30, 2020: Nate Rich, Melinda Staveley

Staff 2017-2018
Julia Hamilton, Lead Minister julia@ussb.org (805) 965-4583 x222
Caitlin Cotter Coillberg, Assistant Minister caitlin@ussb.org (805) 965-4583 x244
Erin Wilson, Director of Administration erin@ussb.org (805) 965-4583 x225
Sara Sautter, Interim Director of Religious Education sara@ussb.org (805) 965-4583 x227
Christina Boardman, Youth Coordinator xttina.garnet@gmail.com
Megan Moyer, Membership Coordinator megan@ussb.org (805) 965-4583 x221
Eden Kennedy, Office Manager eden@ussb.org (805) 965-4583 x224
Greg Otero, Facilities Use Coordinator greg@ussb.org (805) 965-4583 x223
Rob Brown, Building Manager rob@ussb.org (805) 965-4583 x230
Ken Ryals, Chancel Choir Director ken@ussb.org (805) 965-4583 x240
Heather Levin, Pianist heathlev@silcom.com
Jon Diaz, Sexton jon@ussb.org
# Distinguished Service Awards

<table>
<thead>
<tr>
<th>Year</th>
<th>Distinguished Service Award</th>
<th>Lead Minister</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>Mike Noling</td>
<td>Rev. Julia Hamilton</td>
</tr>
<tr>
<td>2017</td>
<td>Joya Sexton</td>
<td>Rev. Julia Hamilton</td>
</tr>
<tr>
<td>2017</td>
<td>Astrid Nelson</td>
<td>Rev. Julia Hamilton</td>
</tr>
<tr>
<td>2016</td>
<td>Gun Dukes</td>
<td>Rev. Julia Hamilton</td>
</tr>
<tr>
<td>2016</td>
<td>Ken Ralph</td>
<td>Rev. Julia Hamilton</td>
</tr>
<tr>
<td>2015</td>
<td>Ted Stern</td>
<td>Rev. Lee Bond-Upson</td>
</tr>
<tr>
<td>2015</td>
<td>Program of Distinction: Ministerial Search Committee</td>
<td>Rev. Lee Bond-Upson</td>
</tr>
<tr>
<td>2014</td>
<td>Susie DuPont</td>
<td>Rev. Aaron McEmrys</td>
</tr>
<tr>
<td>2014</td>
<td>Mary Grimm</td>
<td>Rev. Aaron McEmrys</td>
</tr>
<tr>
<td>2013</td>
<td>Chris Shorb</td>
<td>Rev. Aaron McEmrys</td>
</tr>
<tr>
<td>2013</td>
<td>Carole Sharpe</td>
<td>Rev. Aaron McEmrys</td>
</tr>
<tr>
<td>2012</td>
<td>Carol Schwyzer</td>
<td>Rev. Aaron McEmrys</td>
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<tr>
<td>2012</td>
<td>Joanie Jones</td>
<td>Rev. Aaron McEmrys</td>
</tr>
<tr>
<td>2011</td>
<td>Jody Thomas</td>
<td>Rev. Aaron McEmrys</td>
</tr>
<tr>
<td>2011</td>
<td>John Gilbert</td>
<td>Rev. Aaron McEmrys</td>
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<tr>
<td>2010</td>
<td>John Warnock</td>
<td>Rev. Aaron McEmrys</td>
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<tr>
<td>2010</td>
<td>Kir Zecher</td>
<td>Rev. Aaron McEmrys</td>
</tr>
<tr>
<td>2008</td>
<td>Program of Distinction: Ministerial Search Committee</td>
<td>Rev. Joy Atkinson</td>
</tr>
<tr>
<td>2008</td>
<td>Program of Distinction: Building Project Committee</td>
<td>Rev. Joy Atkinson</td>
</tr>
<tr>
<td>2007</td>
<td>Patricia Reilly</td>
<td>Rev. Kenneth Collier</td>
</tr>
<tr>
<td>2007</td>
<td>Doug Thomas</td>
<td>Rev. Kenneth Collier</td>
</tr>
</tbody>
</table>
**Membership Statistics**

Total Membership: TK

**New Members**
*In chronological order*
1. Nancy Hilyard
2. Megan MacLean
3. Rose MacLean
4. Angie Swanson-Kyriaco
5. Tom Scheff
6. Kim Equinoa
7. Eric Kruger

**Reinstated**
1. James Kyriaco

**Resigned**
TK

**Deceased**
10. Isabelle Burleigh
11. Chris Casebeer
12. Richard Jacoby
13. Doris Kuhns
14. Wann Rawles
15. Shirley Sayre
16. John Schmidhauser
17. Bets Wienecke

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![Nancy Hilyard](image1)
![Megan and Rose MacLean](image2)
![Angie Swanson-Kyriaco](image3)
![Tom Scheff](image4)
![Kim Equinoa and Eric Kruger](image5)
![Isabelle Burleigh](image6)
![Chris Casebeer](image7)
![Richard Jacoby](image8)
![Doris Kuhns](image9)
![Wann Rawles](image10)
![Shirley Sayre](image11)
![John Schmidhauser](image12)
![Bets Wienecke](image13)
USSB Ends Statements

Living with integrity, we:
• Support each other in life and life’s transitions with loving care, joy, celebration and gratitude
• Care for the earth and its rich web of life for current and future generations

Nurturing wonder, we:
• Experience the transcendent that opens us to deep connection and life’s mystery
• Cultivate spiritual practices and engage in lifelong learning, utilizing our hearts and minds

Inspiring action, we:
• Shift the larger culture toward justice and compassion through bold individual and congregational endeavors
• Welcome and connect with people across differences of ethnicity, class, sexual identity, religion, politics and education

Ingathering
Nominating Committee

The charge to the nominating committee is to submit a slate of candidates for the board of trustees and the nominating committee. These candidates are voted on by the members at the annual meeting.

The committee publicized its goals and invited members’ suggestions. It developed documents and systems for its various tasks, including a nominating committee calendar based on the board of trustees calendar. After thoughtful consideration and talking with potential candidates, the committee presented the board of trustees with a slate of candidates for election by the congregation.

For the 2017-2018 year the members of the nominating committee were Carol Schwyzser (chair), Tracy Freeman (secretary), John Hartman, Colin Jones, Nate Rich, and Melinda Staveley.

Carol Schwyzser, Chair
## Adopted Budget for 2018-2019 middle column TK

### Revenue

<table>
<thead>
<tr>
<th>Description</th>
<th>2017-18 Adopted</th>
<th>2017-18 Actual TK</th>
<th>2018-19 Adopted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Membership Pledges</td>
<td>$420,000</td>
<td>$375,535</td>
<td>$420,000</td>
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<td>Fundraising, Grants, Administrative Fees</td>
<td>$50,000</td>
<td>$56,021</td>
<td>$50,500</td>
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<tr>
<td>Contributions Revenue</td>
<td>$38,000</td>
<td>$49,469</td>
<td>$33,000</td>
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<td>Room Use, Weddings, Rentals, etc.</td>
<td>$252,026</td>
<td>$261,989</td>
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<td>Investment Activity</td>
<td>$144,415</td>
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<tr>
<td>Total Revenue</td>
<td>$904,441</td>
<td>$891,024</td>
<td>$912,100</td>
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### Expense

<table>
<thead>
<tr>
<th>Description</th>
<th>2017-18 Adopted</th>
<th>2017-18 Actual TK</th>
<th>2018-19 Adopted</th>
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<tbody>
<tr>
<td>Staff Payroll</td>
<td>$507,655</td>
<td>$513,099</td>
<td>$498,373</td>
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<td>Benefits</td>
<td>$133,111</td>
<td>$146,689</td>
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<tr>
<td>Facility</td>
<td>$109,000</td>
<td>$104,756</td>
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<tr>
<td>Administrative</td>
<td>$68,550</td>
<td>$59,063</td>
<td>$62,688</td>
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<tr>
<td>Supplements to Programs</td>
<td>$12,750</td>
<td>$14,326</td>
<td>$17,470</td>
</tr>
<tr>
<td>District &amp; Association Support</td>
<td>$20,000</td>
<td>$2,859</td>
<td>$30,000</td>
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<tr>
<td>Interest Expense &amp; Principal Pay-down</td>
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<td>$53,232</td>
<td>$53,151</td>
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<tr>
<td>Total Expense</td>
<td>$904,441</td>
<td>$891,024</td>
<td>$912,100</td>
</tr>
<tr>
<td>Net Operating Income</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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</tbody>
</table>

### Notes on 2018-19 Adopted Budget

#### 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.
- **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, Starr-King Parent Child Workshop, Knox School, weddings, and other room users.
- **Contribution Revenue** includes net of miscellaneous gifts and plate collections (for USSB only) less monthly and holiday gifts to outreach.

#### Operating Expenses

- **Staff Payroll** reflects fair compensation wages and salaries for staff and contracted childcare workers.
- **Benefits** includes fair compensation benefits for staff members, including health, retirement, Social Security, longterm disability, and workers compensation.
- **Facilities Expense** includes property and liability insurance, regular maintenance, major maintenance, contract services for gardening, custodial and security services, utilities, supplies, organ maintenance, and earthquake self-insurance.
- **Administration Expense** includes computer hardware, programs, and maintenance telephone/internet service, bookkeeping, office equipment leases, supplies, postage, and newsletter mailing.
- **Supplements to Programs** include cost of program supplies and board expenses. Not included are programs’ individual fundraising efforts and registration fees that are not part of our operating budget.
- **Denominational Support** is based on official membership count of 432 reported February 1, 2017; 53% of Fair Share requested by Unitarian Universalist Association (UUA), and the Pacific Southwest District (PSWD).
- **Interest Expense & Principal Pay-down** includes the paying of interest and principal on mortgage and member loans.
Worship and Ministry

Children’s Religious Education

It was an Interim Year in religious education.

What does that mean? It means a time when trained, temporary staff move the congregation through a process of dreaming, planning, and testing.

Toward that end we hired Sara Sautter as our Interim Director of Religious Education. Bringing 20 years of experience, and trained in interim work by the Unitarian Universalist Association, Sara’s job was to help the congregation discern what it means to be a place where the Society’s assets, and the joy of belonging, come together to nourish people of all ages.

Sara arrived in late August and began by looking closely at the programs in place, having group Talk Back sessions and individual meetings with parents and with congregational leaders. Based on this input, programs were changed to monthly Soul Matters themes. The themes explored in religious education were the same themes explored in worship and in small group ministry.

Interim Start-Up Workshop

The weather was not cooperative with church life in 2017-2018. Fires, evacuations, and disastrous flooding moved the congregation’s planned internal focus toward the community’s needs. As a result, our Interim Start-Up Workshop was delayed until early 2018.

At the Start-Up, forty members of the Society spent a morning and an afternoon with Unitarian Universalist Association consultant Rev. Sarah Gibbs-Millspaugh. We were new parents, grandparents, singles, and large families, together to create a vision for an inclusive multigenerational faith community.

We began by using the Society’s Mission Statement and Ends. Then we brainstormed the ills of the larger society, and the antidotes to those ills. Finally, we went on to identify the “sweet spot,” the place where the Society’s assets, and the joy of belonging, come together.

We identified six actions to move us toward our vision. They are:

1. Create intentional families from the multigenerational wealth of our society. It’s hard to raise a family in high-cost Santa Barbara. Many of us don’t have extended family here, our friends are moving away, and we love that the Society will always be here for us.
2. Engage in social justice work together as families and as a larger church community. We want to do social justice work grounded in spirituality. Help us weave social justice regularly into family events.
3. Worship together, regularly, as a whole community. We want multigenerational worship that includes children and youth. We want children and youth right there up on the dais, as worship associates. Worship is religious education.
4. Pass our beloved Unitarian Principles to the next generation. Ours is a faith that is guided by seven principles that have emerged over the years. We want our children to know and honor them.
5. We love how music can transform us … and so do our children! Let’s utilize the deep talent that we have here at USSB.
6. We are here because we want to be together. We want engagement across the generations. Let’s create and strengthen Beloved Community. Children are natural guides to wonder. Grandparents have wisdom to share.

Teacher Training and Development

Three teacher trainings and development meetings and lunches were held. These meetings allowed teachers to share classroom successes or things that need improvement with staff and fellow team members. The meetings focused on where teachers found the joy in sharing their gifts with children, how to build small-groups in each class, and how to find support.
Faith Development

In addition, with the goal that teaching religious education should be a form of spiritual practice, lesson plans included robust spiritual preparation for teachers.

Worship

Understanding that children need to learn how to worship, a Family Chapel was held on the fourth Sunday of each month. The chapel lasted 30 minutes, included community-building elements like Joys and Concerns, and mirrored a USSB worship service for adults. Best of all, it included professional musical accompaniment and the talents of the USSB choirs.

In one chapel the children remained in their seats as the parents were asked to come forward for the Time for All Ages and were asked “what do YOU remember from worshiping as a child?” Most remembered ritual, music, and the warm feeling of belonging—all important elements to growing life-long Unitarian Universalists.

In early 2018 a designated family area was added to the Sanctuary. This area is labelled and equipped with a rocker, play rugs, and clean toys. It was enthusiastically received by young families, who felt that it encouraged them to worship with their young children, and made them all feel “welcomed and cared for.”

Parents as Primary Religious Educators

In early 2018 a new parents group was created: Parents PLUS. It is an affinity group that focuses on the art of Unitarian Universalist values-based parenting. The group not only included young parents learning new skills, but empty nesters who were able to add perspective to the group. Held monthly, the group began by reading “Tending the Flame,” which created robust discussion.

Also new this year were weekly communications with parents that explained the Sunday lessons and provided additional at-home resources to extend the monthly worship themes at home.

Coming of Age and Middle School Youth Group

The year started with a just a handful of youth interested in Coming of Age. In order to create a more robust environment for peer-driven faith development discussions, a Sunday morning middle school youth group of sixth, seventh, and eighth graders was created that included the Coming of Age youth.

Faith-based discussions took place with the entire group on Sunday mornings. Then, mentor-youth dyads extended the discussions one-on-one. This format allowed the Society to successfully host this important youth program with smaller numbers.

Five group-building social outings were held, including an overnight lock-in at the church where the youth learned about homelessness from a houseless guest, and created hygiene kits for Showers of Blessing.

Young Religious Unitarian Universalists—YRUU

It was also a year of transition and rebuilding in our youth group after many of our youth graduated in 2017. Longtime youth group coordinator Adam Shive stepped down in late 2017 in order to focus on his new career as a high school teacher. Christina Boardman was hired to rebuild the group. The group meeting time was changed to early afternoon to encourage youth to attend worship with their families. Several off-campus community-building activities took place. And guests attended the YRUU meetings to discuss their careers and demonstrate how youth can live their UU values in the wider world.

Family Fun Night

At the recommendation of the YRUU Youth (who were asked “what has kept you involved with this faith community from preschool through high school?”) the Family Fun Night program was resurrected and held on...
a Friday night. A live Irish Band, food, and games provided a lively evening for 40. It was a successful community builder and plans for next year include quarterly Fun Nights.

**Social Justice Sundays**

Service learning is an important element of religious education. Toward that end, we hosted “Hugs for Houston,” and the children created activity kits for other children who were housed in shelters during the devastating floods in the fall of 2017.

Our annual “Hunt for Justice” was tweaked to include homework during the month preceding the hunt. Families were sent information about the good works of three local charities: Court-Appointed Special Advocates, The Freedom Warming Center, and Santa Barbara Channelkeeper. Children were then given the option of supporting one, two, or all three groups by placing tokens that they found during the egg hunt into special jars.

“Healing Helpers” was a Sunday morning project where children built stuffed animals and added cards of hope and healing. The animals were then delivered to children awaiting treatment at Cottage Hospital.

**Numbers!**

- 32 – The number of children officially enrolled in religious education (double from last year).
- 42 – The number of children attending regularly.
- 53 – The number parents active in church programs.

**Gratitude to Our Volunteers**

Facilities
We are lucky to be stewards of such a beautiful historical landmark. Day-to-day and ongoing maintenance keeps our campus in working order. Several larger projects were undertaken as well this year, which served to keep our facilities beautiful, useful, and preserved.

Sanctuary—Organ maintenance and repairs; wood refinishing and staining; replaced carpeting at the pulpit; replaced pew cushions

Parish Hall—Deep cleaning; floors buffed; hearing loop repaired to working order; repaired freezer in Parish Kitchen

Jefferson Hall—Remodel included: new blinds, new paint, new carpeting on stage, new cabinetry, and a new, user-friendly television

Blake Lounge—New carpeting and refinished flooring in Blake classrooms

Grounds—Installed multiple new garbage and recycling containers in lower campus

Rental properties—Repaired fence, replaced dishwasher, did major plumbing work in bathrooms, and repainted

Wedding and Room Rental
Our campus continues to be a buzz of activity. Congregational activity, weddings, memorials, room users, and two schools continue to keep our grounds active and alive throughout the year.

Wedding bookings, in particular, have been on the rise. We had 22 wedding receptions and ceremonies this year. Many of these wedding parties chose to rent our on-site equipment (tables, chairs, lighting), which continues to be lucrative for the congregation. Weddings and wedding equipment rental generated a gross of over $92,000 to our annual operating budget (compared to a gross of $75,000 last year).

Revenue from our regular, ongoing, and one-time room-users brought in over $38,000 gross income toward our operating budget.

Rental Properties
Our rental properties at Arrellaga and La Paz, including two garage storage spaces, have been occupied the majority of the year, with rental income ($$$) helping to offset our mortgage on the properties. This year our rental property at Arrellaga changed lessors, and we made some upgrades and improvements.

Starr King Parent-Child Workshop and Knox School continue to lease. Both schools are thriving and have made great use of the space. Our contract with Starr King is re-negotiated every 10 years and our lease with Knox school is negotiated on an annual basis.

Finances
We are fortunate to have a strong team of lay leaders, committees, teams, and staff to carry out the financial management of the Society that supports our vision, mission, and ends.

Finance Committee
The finance committee, chaired by the treasurer, monitors financials and reports from staff on a monthly basis. The finance committee has concentrated this year on maintaining reports to the board and expanding our monthly financial dashboard to be available to the congregation. The finance committee continued its research into the feasibility of establishing a reserve.

Audit Committee
Our audit committee and auditor conducted an internal audit of the 2015-16 fiscal year finances, returning with a clean audit. The audit committee also prepared for the 2016-17 full financial audit of our finances by an external auditor.
BUDGET PLANNING

Our budget planning group was able to assist staff in recommending a balanced budget to the board and congregation for approval. The budget planning group this year also assisted staff in development of the program-based budget. The program-based budget provides a way of looking at how much of our income is directed to areas of congregational life and clarifies and simplifies the total USSB budget by showing us the use of financial resources in broad program categories and relating our financial work with our Ends. Our work at USSB is split into five categories: Worship, Creating Community, Faith Development, UU Connections, and Outreach and Justice. The pie chart below shows the distribution of revenues across those categories. A full program-based budget with detail was distributed at the annual meeting and is available on our website as well.

ENDOWMENT

Our endowment is overseen by four endowment board members and investments are managed by Trillium, a management company who specializes in socially responsible investing, including fossil fuel–free investment portfolios.
Membership Committee

The mission statement for the Membership Ministry Team states that we are charged with welcoming and inviting visitors, friends, and new members to USSB, and with fostering a sense of connectedness and belonging among all members. We support a climate in which spiritual growth, diversity, and practice of our principles can flourish.

To help interested people learn more about USSB, we continued the Newcomers’ Series, which consists of six sessions: “Campus Tour” (usually led by Gary Welterlen or Rev. Ken Collier), “Membership 101,” “Worship and Liturgy,” “UU History, Justice & Community,” and “Q&A with a Minister” (Rev. Julia or Rev. Caitlin). Members of the team take turns being facilitators: reading for a chalice lighting from a prepared booklet, asking a question of the visitors as an icebreaker, then introducing the guest speaker for that session. We are in the middle of our third set of classes for this year.

We had “Invite a Friend” Sunday, since a good way to get new members is a direct invitation.

Megan Moyer, our staff member, often sets up a table at community events like the Pride Festival and Rising Together and some members help her.

We are also responsible for greeters each Sunday, who are at the table in front and near the side door to welcome newcomers and visitors, give them nametags, and answer questions. Even when we aren’t on official greeter duty, we mingle with new faces but also old timers, making all feel welcome.

We are responsible for the New Member Ceremony and Luncheon.

We coordinate congregational potlucks to create another activity for members to get to know one another better. We work with the Music Ministry committee to do potlucks after their concerts.

We also have members who make anniversary calls, meaning the anniversary of when someone joined. That team calls to say thank you and check on the welfare of members of the congregation.

Each October we have a retreat to renew our commitment and focus on the coming year.

Submitted by Laraine Gray

Membership Ministry team, 2017-18 (from l-r): Charlene Little, Inga Bjornsdottir, Rev. Caitlin Cotter Coillberg, Hathor Hammett, Sarah Carr, Sue Hebert, Jo Magistad, Mike Ristow, Joan Agress, Laraine Gray.
Connection Circles

Connection Circles are groups of eight to ten members who meet twice a month from October through May. The purpose of the groups is to strengthen and expand the life of the congregation. Connection Circles provide an opportunity for individuals to make deep and meaningful connections which sustain them and our community as a whole. Members learn to listen deeply, without interruption or feedback, while sharing stories around the monthly themes of the congregation. Each group is led by a facilitator and follows a format designed to give each person the space and safety to share. Sign-ups for the groups occur in late August and in September of each year. This year, the coordinators of the Connection Circles are Carol Schwyzer and Emily Maynard. Facilitators are Becky Blake, Mignon Bradley, Eileen Bunning, Mike Gorodezky and Melinda Staveley, Diana Platt, Carol Schwyzer, Ann Taves, Howard Wittausch, Mike Ristow, and Janice Ristow.

Submitted by Carol Schwyzer

Science Night

Science Night, held mostly on the third Tuesday of each month, is an informal gathering of people interested in science topics. We watched DVDs of the stars and of nature and then discussed what we had observed. It was enjoyable for all who came, and attendance varied from five to twelve people each time.

-Submitted by Susan Neufeldt
Seventh Principle Action Network (SPAN)

The Seventh Principle Action Network (SPAN) of the Unitarian Society of Santa Barbara, founded in 2012, takes a systems-based approach to justice issues. Our focus is on getting off fossil fuels as an energy source and on the protection of safe, clean, affordable water.

This autumn, we examined the tragic roots of our current crisis by bringing Professor Roxanne Dunbar-Ortiz, author of An Indigenous Peoples’ History of the United States, to Santa Barbara for a community gathering around indigenous trauma and the possibilities for healing. Professor Dunbar-Ortiz presented a widely-attended lecture, “Continental Imperialism and the US Way of War,” followed by a reception and book signing. As part of the same day, Rev. Julia hosted a luncheon and gathering of local indigenous leaders and youth.

In the spring, SPAN helped organize a caravan to Quail Springs Permaculture Farm and Learning Center in Cuyama Valley. Two young children and their families were among those who participated in the day, providing a wonderful intergenerational experience as well as the delights of the Quail Springs center itself. The participants learned how the permaculture motto “Earth Care, People Care, Fair Share” plays out in the careful consideration given all decisions. One of the examples that stood out to all of us was the restrained use of the underground springs amidst Quail Springs’ challenging low-rainfall setting. The springs are still flourishing because they use only what is sustainable, rather than maximizing operations.

SPAN supports the efforts of both local and wider-focused groups such as 350sb/350.org, Food and Water Watch, Environmental Defense Center, Sierra Club, Climate Justice Project, and UU climate and water-related groups by providing information and opportunities for engagement at our table in Parish Hall on select Sundays. Examples include hosting Alena Simon, local organizer with Food and Water Watch, who answered questions about how we can challenge the current proposal to drill more wells in north Santa Barbara County.

We are also informing the congregation about Governor Jerry Brown’s Climate Summit on September 12-14, and the mass event that will bring people from all over California and beyond together on September 8. We hope that many from our area will be present.

SPAN continues to lend UU-published books such as Daring Democracy and the anthology Justice on Earth: People of Faith Working at the Intersection of Race, Class, and the Environment, as well as other current and classic titles relating to protecting the web of all existence in these difficult times.

Submitted by Cheryl Snell
The Library Committee

The Library Committee is responsible for procuring and maintaining the books and movies that can be enjoyed by the members of the congregation without charge. We are Lynn Dow, Tom Moore, Janet Brinckmann, and Ellie Tuazon.

We set up the library on the first and third Sunday of every month, with occasional exceptions. We work in two shifts. The first, from 9:15 to 10:15 AM, opens the library and arranges the movies on special racks, then places the most recently acquired books on one of the tables. This volunteer also readies all supplies for the lending process.

The second shift, from 10:15 to 11:30 AM (also known as the Middle Hour), assists members with their selections as well as the sign-out process. It is at this time that we get to know our customers, whose feedback we welcome.

Once the second service begins we replace all materials in their cabinets and drawers, count those that have been signed out, and lock everything up.

Our current budget is $2,117.00.

Our balance has changed very little from last year because we receive many donations of good books and movies from the congregation. The library committee members have also donated books as well as office supplies. All of these donations are especially welcome now that we do not have any fundraisers.

Since May of 2017 we have culled 60 books and 10 movies. We donated those books to the Santa Fe Senior Community on Cliff Drive. Santa Fe Seniors have actually started a library of their own with our book donations. The movies are given to the Assistance League.

We review a book and movie from our library every month in the Kaleidoscope, at times with the help of members of the congregation.

From May of 2017 to May of 2018 we signed out 125 books and 365 movies.

We ask volunteers to help with at least one shift per month. Specific procedures for the process are available, and volunteers receive their own key.

The Library Committee was established many years ago by several librarians. Our current contact is Ellie Tuazon at ellietuaz@yahoo.com, or (805) 252-9251.

Submitted by Ellie Tuazon

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Submitted by Ellie Tuazon
Our foreign policy discussion forum continued for its third year utilizing the resources published by the Foreign Policy Association and commonly known as the Great Decisions program. The published study guide arrived in January and contained articles on the eight most significant challenges for U.S. foreign policy. In addition to multiple references in the book and on its website at www.greatdecisions.org, the course materials included a DVD presenting background lectures on the selected eight foreign policy subjects.

Our program met twice a month beginning in February and concluded on May 16. More than fifty members and friends participated in the program, both as audience members and in helping with the presentations.

This year the program was enhanced by congregation members who served as program leaders for the sessions. Offering helpful summaries and augmenting the presentations, our program leaders were Adam Shive, Barbara Maxwell, Richard Dow, Ben Senauer, Dick Jensen, John Chere, Melinda Staveley, and Annette Ndagano. We also enjoyed a lecture on China by Eric Ryan, who speaks Mandarin and does business in China. A special thanks goes to Michael Gorodezky, who assisted the leaders with their PowerPoint and video presentations. Jon Diaz provided the audio/visual support and is helping us with upgrading our equipment. Linda Liker assisted with the book sales and accounting needs, while Eden Kennedy helped with our publicity and communications challenges!

An essential component of the Great Decisions program is having the opportunity to discuss the subject material both in small groups each lead by a facilitator and in larger groups. This year the facilitators were Adam Shive, Richard Dow, Joe Fior, and Carol Schwyzer.

With the rise of China’s influence and complex relationship with the U.S. a new China Study Group has been formed that will permit members and friends to meet to discuss and learn from presentations by participants. We expect there will be frequent uses of videos and guest presentations.

Anyone interested participating in attending as well as serving as a program leader, facilitator, or speaker is invited to review the website at www.greatdecisions.org and to contact program coordinator John Warnock at johnwwarnock@gmail.com. We are now using the excellent Realm system to communicate for both the Great Decisions and the China Study Group. Inquiries about the China Study Group can be directed to Ben Senauer at bsenauer@umn.edu, and Joan Agress at jberlineragress@gmail.com.

Submitted by John Warnock
Financial Management

Audit Committee

The board-appointed Audit Committee members for the June 30, 2017 audit were Bill Benjamin, Jeff Carmody, Dick Jensen, Mike Noling (chair), and Bonnie Lassen.

The USSB financials are audited by an independent CPA every three years, and they are “internally reviewed” in the interim two years. The June 30, 2017 year-end review follows the second interim “internal review” year. The financials had a full CPA audit for the June 30, 2017 year-end. The June 30, 2017 audit report was unqualified or, in the new AICPA terminology, was unmodified.

On November 7, 2017 audit committee members Bill Benjamin, Jeff Carmody, Dick Jensen, and Mike Noling met at the Society. Bonnie Lassen was excused. Tom Ridge of the Thomas H. Ridge CPA firm, Director of Administration Erin Wilson, and contract accountant Cindy Young of Accountability Plus attended the meeting.

The audit committee brought questions and thoroughly reviewed and discussed the June 30, 2017 draft audit report. Cindy Young and Erin Wilson had distributed the reports to the committee in advance. All questions raised in the discussion were effectively answered by Tom, Erin, and Cindy. There were edits and revision updates to some of the notes, but no unresolved issues. The revised audit report was circulated to the committee for their review. The audit report, as revised, was forwarded to the board. The board accepted the report.

Erin Wilson confirmed that the ministers would complete and submit their clergy housing forms to the board in December as required by the IRS for ministers.

Copies of the audited financials report, audit committee minutes, and audit committee policy charter are available from the director of administration, Erin Wilson.

Submitted by Mike Noling,
Audit Committee Chair
Endowment Fund

The Unitarian Society of Santa Barbara endowment fund holds and administers bequests and gifts for the benefit of USSB. These gifts are intended for long-term investment and for providing future cash payments to the Society for operations expenses, while preserving or increasing the assets of the fund.

The total assets of the fund reached NUMBERS TK on June 30, 2018.

Semi-annual distributions have been made every year of the fund’s existence to the operations of the USSB. During the 2017-2018 USSB fiscal year, the fund distributed $85,712 to support the Society’s operating needs.

Since June, 2015, investment management services are provided by Trillium Investment Management in a fossil fuel-free and socially responsible portfolio.

Board members, assisted by the USSB Director of Administration Erin Wilson and USSB accountant and bookkeeper Cindy Young, met quarterly to monitor the asset allocation of the fund, the Trillium performance, and to review and approve the quarterly endowment reports to the USSB board of trustees. Distributions to the USSB operating fund were subject to a detailed determination of prudence by the endowment board.

The endowment board acknowledges with gratitude the care and dedication given to the fund by Jeff Carmody, who at the end of 2017 termed out from the board after serving six years. Jeff provided historical perspective that was invaluable to the board, particularly regarding the transitioning into the fossil fuel-free portfolio under Trillium’s management.

Current directors of the endowment fund are Gun Dukes (chair since January 2017), Paul Freeman, and Charles Hamilton. Onolee Zwicke serves on the endowment fund board as the USSB board treasurer. Directors are appointed by the board of trustees of the Society and may not serve for more than two consecutive three-year terms.

Legacy and lifetime gifts to the endowment fund provide long-term financial support of our mission and values for generations to come. 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. The Chalice Circle is a planned-giving program, described ON PAGE TK, that facilitates anyone interested in supporting our Society through the endowment fund and provides a variety of tax-advantaged ideas for making contributions.

Submitted by Gun Dukes

Stewardship

The Stewardship Visionary Team was created to discuss best practices in congregational stewardship, and methods to encourage community generosity. We have researched what other congregations do and have discussed ways we can improve our own engagement in stewardship and fundraising activities. We have worked closely with our ministers and director of administration to ensure that our activities are congruent with our spiritual values and within the scope of who we are as a congregation.

This past year we instituted monthly Stewardship Circles in which volunteer circle leaders offer information and assistance to their circle members, helping to make our pledge renewal process easy. We are in the process of evaluating the success of this new program.

We also support the creative work that goes into the success of our annual fall auction, and the appreciation of our ongoing Chalice Circle members.

Respectfully submitted,
Susie DuPont, Stewardship Team Leader
**Planned Giving**

It is my pleasure to present the 2017-2018 planned giving report. The goal of planned giving is to encourage members to make legacy gifts to the Unitarian Society through their estate plans. A planning advisor is assigned to assist members who wish to make legacy gifts to the endowment fund, or directly to the Society; or a major gift during their lifetime to the Society. In doing so, members and friends are invited to be members of the Chalice Circle in recognition of their living or legacy commitment. On March 1, 2018, the value of the total assets of the Fund was $1,485,000. Through semiannual payments to the operating fund, the endowment fund offers members a continuing legacy to the Society, providing long-term financial support of our mission and values for generations to come.

Approximately 100 of the Society’s members are in Chalice Circle and this year we welcomed two new members. On May 6, 2018, 45 members attended the Chalice Circle recognition program that featured a social, and endowment update, a presentation on the UUA’s Wake Now Our Vision (WNOV) matching grant program, and a preview of the legacy project to be launched in 2018.

**Gary Welterlen** served as chair in 2017-2018 and will lead the efforts in 2018-2019. The goals of 2018-2019 will be Chalice Circle member retention and recruitment. Retention of Chalice Circle members will focus on more face-to-face communication: gatherings that provide opportunities to meet on selected subjects and engage with our ministers and staff, and holding our annual Chalice Circle recognition event. Recruitment will focus on educating members of the Society of the importance of legacy gifts to the Society, the value of the gift to the donor and their family, and recognition of the commitment in Chalice Circle. We plan to leverage the WNOV program during this time.

As part of the shared ministry of the congregation our planned giving advisors are available to meet with members on a confidential basis to help with estate planning, financial and health care agents, real estate matters, and planned giving opportunities, and can provide names of respected professionals in town. Our planned giving advisors are: **Gun Dukes, Nancy Edmundson, Dick Jensen, Mike Noling, Carol Schwyzter, Ted Stern, and John Warnock.**

To find out more about planned giving opportunities contact Director of Administration **Erin Wilson**, who will direct you to a planned giving advisor.

RESPECTFULLY SUBMITTED BY

**Gary Welterlen, Chair**
PARTNER REPORTS

The Alliance

The Alliance is a non-profit organization supported by its dues-paying members. Members are men and women, mainly of the USSB congregation, who wish to learn, socialize, and support USSB projects and community non-profits. The purposes of The Alliance are to provide support, education, training, and deep connections among its members and to aid USSB and agencies beneficial to the welfare of the Santa Barbara and world community. Members and non-members alike are welcome to gather monthly, October to June, on the first Friday of the month at 2:00 p.m. in Parish Hall. Annually, members elect a board of directors to conduct the business of arranging programs, staying in touch with the members, and managing its funds.

This year programs were presented by members Ken Ralph, who offered a program on the Showers of Blessing program and homelessness, and former Santa Barbara mayor and City College trustee Marty Blum, who spoke during Women’s Month from her experiences as a woman in elected office. The holiday music program was provided by USSB Music Director Ken Ryals. Other presenters included Sharon Rippner, climate activist, who informed us about climate change and Citizens Climate Lobby’s work; community activist Simone Baker of Black Lives Matter who spoke about policing policies in Santa Barbara; Dr. Ken Kozik from UCSB, who presented research in Alzheimer’s disease; Santa Barbara County DA’s office representative Ruth Corona reporting on senior scams; and the Assistance Dogs Program, which rescues dogs and trains them to assist people with hearing loss or PTSD.

The Alliance made gifts to the Unitarian Society for an automated external defibrillator and to contribute to the purchase of a piano for Jefferson Hall, and to the USSB music committee and the USSB Hopi mission trip. Donations were also made to organizations including the Showers of Blessing, Citizens Climate Lobby San Luis Obispo Chapter, the Lower Westside Community Center, and the Nuclear Age Peace Foundation.

The Alliance Board of Directors for 2017-18 were Sylvia Abualy, Anita Blume, Kathleen Boehm, Claire Chytilo, Gun Dukes, Betty Noling, and Carol Schwyzer.

CAROL SCHWYZER, ALLIANCE PRESIDENT

Sylvia Abualy with Dr. Ken Kosik, who spoke at the January Alliance meeting.

Nuclear Age Peace Foundation speaker Rick Wayman (right) with Mark Hamilton at the April meeting.

May’s Alliance program on senior fraud was presented by representatives from the Santa Barbara District Attorney’s office, here with Betty Noling (left) of the Alliance Program Committee.

Tia, the hearing dog, and Barb Velasquiz from the Sam Simon Foundation this past June.
AHA!’s growth, since 1999, from a small organization serving a few dozen youth per year in the summer to its current reach—serving several thousand teens, parents, and youth providers each year with a staff of 25—has maintained one important through-line: USSB’s generous provision of its Jefferson Hall space for the majority of our after-school and summer groups.

AHA! participants learn to listen to with empathy and compassion; to nonviolently interrupt hateful speech and actions; to reach out as caring allies to those struggling with ill treatment or life challenges; to hold a strength-based mindset and be explicit about gratitude and appreciation; and to cultivate and develop habits of thought and action that set the stage for fulfilled, productive adult lives and healthy relationships.

This past year, in by-donation out-of-school (OOS) programs—most of which meet at Jefferson Hall at USSB—we served 125 youth in 10 after-school groups. In a ratio of one skilled, compassionate, experienced youth facilitator per every 6-8 youth, AHA! participants experience intensive support and mentorship. In many cases, youth in our programs reveal that their time with us “saved [their] life.” Over 25 parents sat in our once-per-quarter Parent Groups. Survey results show that 74% of OOS program participants reported improvement in 10 or more problematic areas of their lives (issues with school, family, jobs, authority figures, the law, drugs, alcohol, self-harm).

We offered a grieving circle in the aftermath of the suicide cluster last spring and took 15 after-school and summer youth on an epic camping trip in the Sierras. Our AHA! Method Training for 50 Ventura educators was a huge success. We created a community-building event, Rising Together, which gathered 300 people from across the South Coast to celebrate resiliency and connection.

It has been a tough year for youth and families, with immigration concerns, natural disasters, teen suicides and attempts, and threats of mass violence on at least two area campuses. We’ve ramped up our efforts to be of service in this time, and we thank the USSB so much for its role in making our work possible.

MELISSA LOWENSTEIN, PROGRAMS COORDINATOR

This giant dove rising from flames was built of 300 white-shirted community members at Rising Together at Santa Barbara City College on April 21, 2018! Thank you for being there!
Starr King Parent Child Workshop

On behalf of Starr King, it gives me great pleasure to thank the Unitarian Society of Santa Barbara for your continued support. The shared space allows Starr King to continue to provide the quality parent education program in an attractive natural environment. We are most grateful for this collaboration and proud of our ongoing success.

**Population Served**

We served sixty-three families this year. Our efforts to increase diversity are evident in the ethnically diverse families, diverse family structures, and increased number of children with special needs.

**Financial Assistance and Support**

Six families received financial assistance through work exchange. In addition, ten families received flex plans in order to meet the minimum participation requirements.

This year was particularly challenging for several of our families who were affected by the fire and mudslides. We supported a family who was displaced as a result of the disasters by enrolling their four-year-old in Starr King.

**Parent Education Curriculum**

**Fall Term:** Child Development—An Overview for Parents

**Spring Term:** Child, Family, and Community

Guest speakers: Olga Loya, professional storyteller, Santa Barbara Transgender Association Network (SBTAN)

**Sharing the Model**

1. This year we hosted two early childhood education classes.

2. Joanna Whitlow, former Starr King parent and founder of Mariposa Parent Cooperative Program in Coachella Valley, was inspired by her experience at Starr King and modeled her program after it.

**Major Staff Changes Expected in 2018-2019**

Suzanne Rebstock, Starr King Assistant Director, is retiring at the end of this year.

Christen Barajas Zampese, afternoon teacher, is also moving on this year.

It has been an honor to work with both Suzanne and Christen. I hold them in high esteem and regard them as professional educators in every sense of the word. Suzanne and Christen will be greatly missed. We wish them both much happiness and thank them for the many contributions they’ve made to Starr King.

Assistant Director    Afternoon Teacher
21 years    10 years

**Annual Rummage Sale**

Our annual rummage sale at Earl Warren was a great success. We invite you to join us next year on February 9, 2019.

**Special Thank You!**

I would like to extend a special thanks to Erin, Rob, and Jon for their quick action in addressing the clean up after the fire, flooding, and break-in.

Respectfully,

Yolanda Medina-Garcia

Starr King Parent-Child Workshop