

ANNUAL REPORT

April 1, 2009 to March 31, 2010



Unitarian Universalist Church of Sarasota

3975 Fruitville Road Sarasota, Fl. 34232-1614
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Annual Report for Church Year 2009-2010

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ADMINISTRATIVE STAFF

Minister:	Margret A. O'Neill	371-4974
Church President:	Rick Sandler	412-0906
Religious Exploration:	Ginny Griesé	907-2143
Pianist:	Jan Dorsett	929-0149
Choir Director:	Robert Lischetti	926-2766
Custodian:	Katherine Isabelle	371-4974

BOARD OF TRUSTEES

President:	Rick Sandler	412-0906
Vice President:	Muriel Redifer	926-4138
Treasurer:	Barbara DeMaio	371-8118
Secretary:	Dee Widder	377-9028
Trustees:	Joanne Curtis	929-0578
	Catherine Cyrus	359-9511
	Dana Keller	377-9815
	Pat Liebert	379-0317
	Sue Moreland	362-9497
	Sara Slate	487-7086

BOARD OF DIRECTORS: ENDOWMENT FUND, INC.

President:	Charles Peirce	379-3463
Vice President:	Jim Craig	751-5194
Treasurer:	Jim Keeney	928-3378
Secretary:	Tam Milton	923-0329
Members:	Barbara DeMaio	371-8118
	Janis Williams	371-8118

Purpose of Annual Report

The purpose of this non-profit Corporate Annual Report is to report the activities and accomplishments of the Board of Trustees, Staff, Committees and activities of the Unitarian Universalist Church of Sarasota for the fiscal year 2009-2010. The purposes and accomplishments are provided as reported by the appropriate responsible parties.

CHURCH HISTORY

Founded in February 1952 as a Fellowship, the first meetings of this congregation were held in the "Garden House" of Phyllis and Irving Vendig. Original signers of the Fellowship Membership Book were: Yvonne and Alfred W. Birks, Charlotte D. Cahoon, Louise and Richard Floeth, Ella Kaubler, Selma Lee, Alice P. Leighton, John and Ruth B. Logan, Gertrude S. Martin, Adella L. and Albert R. Miller, Dolores and Stephen W. Steinecke, Dorothy B. Stone, Howard L. and Ruth C. Trueblood, Mrs. Mable R. Undine, Irving and Phyllis Vendig. Moving, as it grew in size, to the building at the corner of First Street and Coconut (then the Women's Club), the Fellowship expanded its program to include Religious Education for children and a monthly discussion group.

The Fellowship became incorporated in 1960 as the Unitarian Church of Sarasota. In 1962 it moved to its present location and its own building. Land for the building had been donated by Dr. Paul Rosenbaum and funds for the building came (with the impetus of a gift from the estate of Stephen W. Steinecke) from contributions by members and friends.

The name of the church was changed in 1981 to the Unitarian Universalist Church of Sarasota to reflect the change within our denomination. Major renovations and additions to the church buildings were completed in the fall of 1984.

In 1990, with funds from the Ruth Oleskey and Elizabeth Hager Memorials and donations from members and friends, a courtyard beautification was completed with brick pavers, plantings and new benches. A new extensive sound system was installed in 1992 in the Sanctuary, donated by the Phillip Gelb Memorial.

In recent years there have been significant additions to our buildings and grounds. Beginning in 1998 the Memorial Garden has undergone important renovation, and in 2000 the South Wing was built and dedicated. In 2002, we replaced all the old chairs in the Sanctuary with new cranberry colored chairs and in 2003 and 2004; all air conditioners in the Sanctuary were replaced. In 2006 the Courtyard was renovated and in 2007 parking lot lights were added to both the front and back parking lots. The church kitchen was renovated in 2008 and 2009, complete with brand new appliances.

The Unitarian Universalist Church of Sarasota celebrated its 50th anniversary in 2002. And under the leadership of both ministers and laypersons, our church has continued to maintain itself as an institution of liberal religion in our community.

OFFICERS of the BOARD

One year term, April 2010 – March 2011

President	Rick Sandler	Treasurer	Richard Happy
Vice President	Sue Moreland	Secretary	Barbara Silvera

BOARD MEMBERS (Trustees)

Joanne Curtis	(2009-2011)	Dana Keller	(2010-2012)
Cathy Cyrus	(2009-2011)	Pat Liebert	(2010-2012)
Muriel Redifer	(2009-2011)	Sara Slate	(2010-2012)

NOMINATING COMMITTEE for 2010-2011

Slate of candidates (prepared by the Nominating Committee) of officers and members for the Board of Trustees to be voted on by members of the congregation:

June Brasgalla	Susan Hallock
Tom Cook	Nancy Thomas
Jeanie Craig	Dee Widder (retiring Board Member)
Barbara DeMaio (retiring Board Member)	

MINISTERIAL SEARCH COMMITTEE

Pending approval by the congregation, this committee will be installed at the April 11 Sunday service and will begin their work

Ruth Agnew	Wilda Meier
Ron Brown	Jim Raudabaugh
Jeanie Craig	Ruth Sheridan
Shirley Foss	Don Slate
	Gayle Van Peenen

MINISTERS

The Reverend Margret A. O'Neill (Interim)	2009 -
The Reverend Roger C. Peltier	2007-2009
The Reverend Don Vaughn-Foerster (Interim)	2006-2007
The Reverend Dr. Janet E. Newman (Interim)	2006-2006
The Reverend W. Donald Beaudreault	1999-2006
The Reverend Dr. Janet E. Newman (Interim)	1998-1999
The Reverend Richard E. Benner	1987-1998
The Reverend Eileen B. Karpeles (Interim)	1986-1987
The Reverend Richard A. Kellaway	1981-1986
The Reverend Sidney J. Peterman (Interim)	1980-1981
The Reverend Thomas J. Savage	1971-1980
The Reverend Todd Taylor	1967-1970
The Reverend Khoren Arisian	1964-1966
The Reverend M. McKarl Nielsen	1956-1964

PRESIDENTS

Rick Sandler	2009 -
Gail Colella	2007-2009
Jim Raudabaugh	2005-2007
Jill DeLano	2004-2005
Ruth Sheridan	2003-2004
Shirley Foss	2002-2003
Richard Happy	2000-2002
Sara Anderson	1999-2000
Frank J. Dunn	1995-1999
Richard Swerling	1994-1995
Mary Anne Bowie	1992-1994
Ellen Betz	1992
John Wynne	1991-1992
Joseph Colella	1990-1991
Marie Millett	1989-1990
John Wynne	1988-1989
Stephen Ellis	1986-1988
Joan O'Hara	1984-1986
David Eicher	1982-1984
Kenneth Happy	1980-1982
Stuart Richardson	1979-1980
James Chambliss	1978-1979
Desmond O'Hara	1976-1978
James Chambliss	1975-1976
Kenneth Happy	1973-1975
Joseph Lehman	1972-1973
Laura Rendina	1971-1972
Frederick Derr	1970-1971
Dr. John B. Logan	1969-1970
Waldo Profitt	1967-1969
William Boylston	1966-1967
Irving Vendig	1965-1966
Dr. Preston Knapp	1964-1965
Donald Johns	1963-1964
Robert Watt	1962-1963
Ewin R. Spotswood	1960-1962
Robert Lexow	1959-1960
Harry Karnaghan	1957-1959
Stephen W. Steinecke	1952-1957

COMMITTEES AND CHAIRPERSONS

Archive	Jim Raudabaugh	923-9766
Artisans	Nancy Sciore	922-0243
Arts Council	Judi Hennard	373-0530
Audio	Gail Perr Czina & Richard Czina	378-2671
Bed & Breakfast	Logan Nicholson & Ron Brown	922-0883
Book Table	Valerie Kerwin	923-6716
Bridge for Fun	Mira Frederick	921-6594
Buildings & Grounds	Jill DeLano	377-3484
Caring	Dee Widder	377-9028
	Diane Happy	316-6499
Choir	Robert Lischetti	926-2766
Communications	Rick Sandler	412-0906
Denominational Affairs	Lura Bradberry	366-3713
	Joanne Curtis	929-0578
Elves	Marie Millett	351-6281
Emerson Memorial Garden	Diane Happy	316-6499
Film Discussion	Louise King	379-0849
Finance	Richard Happy	316-6499
Forum	John Stinespring	922-8141
Free Thinkers	Don DeMaio	371-8118
French Conversation	Eva Frank	925-4643
Fund Raising:		
Service Auction	Shirley Foss	377-6182
	Marie Keeney	350-9868
Flea Market	Ron Brown	922-0883
Get-Together Suppers	Jeanie Craig	751-5194
	Joanne Curtis	929-0578
Interweave	Ron Brown	922-0883
L.E.A.P.	Bob Dobson	351-6207
Library	Valerie Kerwin	923-6716
Membership Development	Joanne Curtis	929-0578
	Jeanie Craig	751-5194
	Mira Frederick	921-6594
Memorial Services	Diane Happy	316-6499
	Dee Widder	377-9028
Music Programs	Don DeMaio	371-8118
Nominating	Catherine Dente	921-1598
Religious Exploration	Mary Lou Keller	377-9815
Second Sunday Potlucks	Tom & Kathy Cook	923-1909
Social Concerns	Julie Leach	312-9774
	Susan Hallock	918-1342
Stewardship	Jeanie Craig	751-5194
	Sue Moreland	362-9497
Sunday Celebrations	Klaus Obermeit	780-7763
Sunday Service Arrangements	Louise King	379-0849

COMMITTEES AND CHAIRPERSONS – cont.

Tribute Fund	Esther Martin	923-2177
UU Service Committee	Sue Sherman	922-5090
Volunteer Coordinator	June Bragalla	379-6071
	Kathy Cook	923-1909

MINISTER'S ANNUAL REPORT TO THE CONGREGATION

Margret A. O'Neill, Interim Minister

August 2009 – March 2010

I arrived in Sarasota in August 2009, with a one-year contract as your Interim Minister and the option that we could continue for a second year. I was very warmly greeted by this engaging church community. I began in August to meet with most church committees as time allowed, and this is a practice I have continued, since it supports my understanding of the church, its activities and its needs. My time in the pulpit began in September, and since then I have been your preacher most Sundays, with the other Sundays capably handled by the Sunday Celebrations committee. I also provide Memorial Services and other rites of passage, and work with the pastoral care, social justice, religious education and music programs.

As an Intentional Interim Minister, my role in the church is twofold: to serve the church in its ministerial needs during this time while you prepare for your next called minister, and to serve as a specialized consultant to help the church move through the transition process in preparing for the next minister, deepening its capacity and vitality. I am guided by the professional standards for Intentional Interim Ministry, by the goals set by the Board of Trustees for this time, and by my own understanding of the priorities and needs in the church as it prepares for a new ministry. I am supported in this work by the Transition Leadership Council (TLC), whose members are Tom Cook, Julie Leach, Paul Lewis, Jim Raudabaugh and Dee Widder. I meet monthly with the TLC.

Tasks of the Interim Time

The components of intentional interim work, and my activities in this area, are:

To engage with the history of the church

I researched the history of the church and led a participatory session called "Remembering and Understanding" in the Sanctuary on November 8, 2009, with about 60 members attending. The discussion was lively and engaging. The "history wall" sheets were posted in the South Wing until November 30, and I used them to write the sermon on *History, Myth and Meaning* for December 6. The sermon identified patterns in the church's history, particularly issues around ministry and theology, dating back to its origins in the Fellowship Movement and the emergence of Religious Humanism

MINISTER'S ANNUAL REPORT TO THE CONGREGATION – cont.

To explore and affirm the identity, mission, purpose of the church

I have reviewed the work the church has done to articulate its mission, purpose, covenant and vision in previous years, and will work with the Board of Trustees and the Ministerial Search Committee to design the best way to approach this area in support of the search process.

To strengthen lay and ministerial leadership, roles and relationships

The Board of Trustees created a Staffing Task Force which worked during December and January to analyze the functions necessary to lead and manage the church, and reported to the Board at the January 2010 meeting. The Board accepted the recommendations of the Task Force, which included affirming the Minister as the head of staff, expanding the role of the Church Administrator and adding a half-time Administrative Assistant position, and expanding the current Religious Education position into a three-quarters time Education/Social Justice position to provide staff support to Children's and Adult Education and greater integration with the Social Justice priorities of the church. Other positions for Pastoral Care and Member Involvement may be added later.

To re-vitalize denominational connections

The church is actively involved in the Southwest Cluster of Congregations in the Florida District of the UUA, and hosted the March 2010 meeting. The UUA national and district offices will provide support for the Ministerial Search Committee as it begins its work in April.

To prepare for new ministerial leadership and the future of the church

Once the Ministerial Search Committee is elected at the annual congregational meeting on March 28, 2010, I will work with them to support their process.

MINISTER'S ANNUAL REPORT TO THE CONGREGATION – cont.

Board Goals for the Interim Time

On October 31, 2009, the members of Board of Trustees and Transition Leadership Council established four high-priority goals for the work we do together during the interim time. Those goals, and my activities related to them, are:

1. To achieve clear delegation of authority and reporting relationships

The “Goal 1 Task Force” will begin work in March to review existing operating rules, policies and procedures to assure that authority and responsibility are clearly identified to guide church staff and leaders. This will build on the work begun by the Staffing Task Force to clarify the relationship among the Board of Trustees, committees, Minister and other staff members

2. To determine what positions (current/potential) are needed and which should be funded

The new Staffing Plan was adopted at the January 2010 Board meeting, and initial implementation was built into the budget for 2010-2011. Position descriptions are being prepared and specific positions will be filled as quickly as possible.

3. To address the humanist/spiritualist differences that divide the congregation.

A class on theological articulation and discussion, *Beliefs: Mine, Yours, Ours*, was offered January- March 2010, with approximately 20 people enrolled. The sermons on January 24 (*Speaking of God*) and January 31 (*Tolerance, Acceptance, Appreciation*) were designed specifically to address the issues of finding common language, common ground and common commitment within our diverse beliefs. The Chalice Groups program, in which people engage in deep thinking and deep listening as conscious communication practices, was re-vitalized, a leadership committee formed, and eleven facilitators trained. Following a kick-off on January 10, six groups are fully subscribed for the initial eight-week session.

4. To design a document with detailed specifications that expresses what we want in a minister, and is clear about deal-breakers.

As the Ministerial Search Committee begins its work, I will work with them in various ways to clarify the church's ministerial needs and the best strategies for the search process.

I am deeply honored to serve as your minister during this time, and I look forward to the work we continue to do together.

Rev. Margret A. O'Neill
Interim Minister

PRESIDENT'S REPORT

This has been a very busy and successful year at UUCS. With the news of Rev. Peltier's departure at the end of last summer, the Interim Search Committee swung into action. I believe I can safely speak for the bulk of the congregation in saying that we are delighted with the leadership that Rev. Margret O'Neall is providing to the church. I'm so glad Margret has agreed to stay with us for two years; that will give us the time we need to work on church governance and to put into place many systems and procedures that will place us in good stead for the arrival of our next settled minister.

We also welcomed a new music director. With David Katz's decision to move on, we were able to re-think the position of choir director. Paul Lewis informed the Board that he preferred to step down after seven years helming the choir. Paul has done an exceptional job and all of us are grateful to him. We're also very pleased to welcome Robert Lischetti to our church; he's doing a terrific job and the choir is sounding stronger every week.

We've also got a new roof over our heads. After years of patching leaks and worrying about the viability of the flat roofs, we came to the conclusion that we had to make significant long-term repairs to ensure the safety of the buildings. While this represented a considerable expense to us, the Board and the Finance Committee believed that this was the best solution. My personal thanks to Jill DeLano and to Sutter Roofing for a job well done. We've got a 15 year warranty so we should not have to worry about leaks for a long time.

We've had two highly successful fundraisers this year. Ron Brown chaired a very well attended Flea Market, with the help of many, many volunteers. And in January, Marie Keeney and Shirley Foss brought off another excellent Serendipity Auction. This was our biggest fundraiser of the year, bringing in well over \$20,000! Bravo to these hard-working co-chairs and their terrific volunteers.

Jeanie Craig and Sue Moreland kicked off this year's stewardship campaign with a great dinner, featuring the music of Booker High School students. Over 70 volunteers worked hard to make this a memorable event and a strong way to start our annual pledge drive.

An important goal facing us is to find a settled minister who will assume duties starting in 2011. I'm very pleased that we have a ministerial search committee up and running. This committee is composed of nine members of our congregation who will be charged with the task of working with the UUA to identify the best candidate to build on the momentum we now have. I'm sure we'll all be hearing a lot more about their work during this calendar year as the committee probes our members to learn more about what we are looking for in a minister.

PRESIDENT'S REPORT – cont.

The Membership Committee has been hard at work too. We're now up to 315 members, making us one of Florida's largest UU churches. Thanks to Jeanie Craig, Joanne Curtis and Mira Fredrick for organizing the Discover UU program, and for welcoming new members and ensuring that they get involved in church activities.

On a more disappointing note, we were sorry to learn of Sandy Theiss's decision to leave UUCS. After six years with us as our Office Manager, Sandy decided it was time to move on; we will all miss her and are grateful for the many contributions she made to this church. The remainder of our wonderful staff has done a terrific job. Thanks go to Ginny Griese for strengthening and growing the Religious Education program. Jan Dorsett always provides inspirational music each week. Katherine Isabelle makes sure the building is well maintained as our custodian.

I also want to thank Klaus Obermeit and the Celebrations Committee for their commitment to providing quality programming during the summer months and for the times when Rev. O'Neill is not in the pulpit. It's no easy task to find interesting speakers; they have done an excellent job.

And, finally, my thanks to our excellent Board of Trustees. It is a great privilege for me to work with these amazing people who give so much to our church. They make my life easier with their dedication and their expertise. I look forward to welcoming Barbara Silvera and Dick Happy as they join the Board and thank departing Board members Dee Widder and Barbara DeMaio for their contributions.

I am continually delighted by the energy, enthusiasm, and support that you, our members and friends, give to this church. We talk often about the donation of time, treasure, and talent. You give it all in spades. Thanks to all of you for making this a healthy and vital church. I look forward to working with you again this year.

Rick Sandler
President

FINANCE REPORT

The general purpose of the Finance Committee is to insure that all financial matters pertaining to the church are reviewed and that recommendations regarding those matters are made to the Board. In addition to its customary tasks of monitoring church financial reports on a regular basis, proposing an annual budget and reviewing contracts, the Committee, led by Committee member James Craig, spearheaded an effort to change the By-Laws of both the Endowment Fund and the Church, as well as the Articles of Incorporation of the Church. Said changes would insure a steady revenue stream from the Endowment Board to the Church and would allow the Church to receive a loan in the case of a catastrophe. (As of this writing, Church members have passed the by-law changes at the first of two required Endowment meetings and will consider the recommended changes to the Endowment Fund, the Church By-Laws and the Articles of Incorporation at the Church Annual Meeting.)

The Committee also made recommendations to the Board for funding a major roof repair project. All flat roofs were redone at a cost of \$110,000 with \$50,000 coming from our Capital Repair and Replacement Reserve Fund and approximately \$60,000 coming from a loan from the Lexow Gift Fund. (In the late winter of 2009, the Church received word that it was the beneficiary of an annuity valued at approximately \$270,000. The annuity was from Robert Lexow, a former president of our Congregation. The Finance Committee has made recommendations to the Board on the management of the Fund until it can be transferred to the Endowment Fund upon completion of the changes in the by-Laws as mentioned above.)

And among other matters, the Committee has been active in creating a budget for 2010-2011 that will facilitate a whole new staffing plan for the Church for next year.

In the upcoming year, in addition to its regular work, the Finance Committee will explore the use of credit cards, debit cards and on-line giving and will support the Personnel Committee in its work creating job descriptions and letters of agreement.

I wish to thank the members of the Finance Committee for the time spent working in the sometimes-grueling world of church finance. In particular, I am appreciative of the many hours of work put in by committee member Jim Craig who prepared and shepherded the church amendments and to committee member Julie Leach, who spent a great deal of time helping us to properly record, track and invest our church monies.

Richard Happy
Chair

TREASURER'S REPORT

Last year at this time we tightened our belts a little at UUCS, shrinking our previous budget by almost 4% in anticipation of a who-knows-what kind of year ahead. In March 2009 the market took a nose-dive and none of us knew if the economy was going to get better, stay the same, or become worse. So we felt the best course was to be as conservative as possible with our finances and just try to hang on. It turned out not to be as bad as we feared, and now, as we approach the end of our fiscal year, it looks like we will be a little ahead in terms of our income versus our expenses.

Tougher times were probably responsible for the reduced amount in our collections this year, which are down from what we projected in the budget, and they are probably responsible at least in part for our reduced rental income for the year. But fortunately these numbers have been offset by those for our two major fund-raisers, the flea market and the auction, which both surpassed what we projected for them in the budget. Our bottom line this year was also helped by several contributions that came into the church unexpectedly and by the fact that many of our new members made a financial commitment in their first year.

In terms of expenses, our aging infrastructure is taking its toll and we spent our repairs and renovations line at over 200%. The message here is we will likely need to budget more for this expense in the future.

And then there was the roof. Several years of employing a "patch it up" kind of approach no longer sufficed, and last fall we were faced with the reality of having to replace all the flat roofs on our buildings. The good news is that through a combination of factors, i.e., a competitive pricing climate from contractors, some hard negotiating by our Building and Grounds Chair, and an energy-saving rebate from Florida Power and Light, we were able to price this replacement at \$110,500. And because the church had wisely set aside funds in previous years, we could pay \$50,400 from our Capital Repair and Replacement Fund and borrow the remaining \$60,100 at advantageous terms from our Endowment Fund.

But even in these leaner times the generosity of our congregation continues; more than \$22,000 was collected and distributed to fifteen service organizations in 2009. Sharing what we have even when it becomes less remains a constant at UUCS. And as we close out this fiscal year and prepare to begin a new one our foundation continues to be solid, thanks to all of you.

Barbara DeMaio
UUCS Treasurer

UUCS ENDOWMENT BOARD REPORT

The UUCS Endowment Fund is a separate corporation from the Church, but its membership is the same as that of the Church. The affairs of the Fund are conducted by the Endowment Board. There are five elected members of the Board. For the past year they have been Jim Craig (vice president), Jim Keeney (treasurer), Tam Milton (secretary), Charles Peirce (president) and Janis Williams. The sixth voting member is the Treasurer of the Church (Barbara DeMaio). The minister and the president of the congregation are ex-officio members of the Board.

The duties of the Board include promoting and maintaining the Endowment Fund. During the past fiscal year of the Fund, ending on December 31, 2009 the Fund rebounded somewhat from a difficult 2008, as shown in the accompanying Treasurer's Report. The Fund is virtually totally invested in the UUA Common Endowment Fund.

The Board spent much effort during the past year working with the Church Board and Finance Committee to make badly needed updates to the by-laws of both the Church and Endowment Fund. Those changes are being presented to the Members at Special and Annual Meetings.

The Board is indebted to Tam Milton, who has completed her term on the Board, most recently serving as Secretary. We also thank each of you who have contributed to the Fund and hope you will consider it when making contributions or doing estate planning.

We welcome your questions about the ways in which you may contribute to the Fund. The Endowment Fund helps insure that there will always be a Unitarian Universalist Church in Sarasota.

*Charles Peirce,
President*

ENDOWMENT FUND
Annual Report FY 2009 - Jim Keeney, Treasurer

Income and Expenses	FY 2009 31-Dec-09	FY 2008 31-Dec-08	FY 2007 31-Dec-07	FY 2006 31-Dec-06	FY 2005 31-Dec-05	FY 2004 31-Dec-04
<u>CASH ACCOUNT</u>						
Cash contributions received	\$ 5,641.00	\$ 595.00	\$,610.00	\$ 2,779.00	\$ 54,718.00	\$ 745.00
Principal and interest payments on Endow. Fund mtg. loan to church	\$ -	\$ -	<i>Paid off during 2006</i>	\$ 10,103.00	\$ 4,680.36	\$ 4,680.36
Bank Interest **	\$ -	\$ -	-	\$ -	\$ 215.23	
Total funds received*	\$ 5,641.00	\$ 595.00	\$ 1,610.00	\$ 12,882.00	\$ 59,613.59	\$ 5,425.36
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Funds transferred (to) / from checking to/from UUCEF investment account****	\$ 9,000.00	\$ -	\$ 2,500.00	\$(10,000.00)	\$(50,000.00)	
Bank charges & Other expenses	\$ -	\$ -		\$ (61.00)	\$ (197.25)	
Endowment Fd. Contrib. to Church operating account*****	\$ (14,000.00)	\$ -	\$ (5,000.00)	\$ (5,000.00)	\$ (5,000.00)	\$ (5,000.00)
Net cash in /(out)	\$ 641.00	\$ 595.00	\$ (890.00)	\$ (2,179.00)	\$ 4,416.34	\$ 425.36
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<u>INVESTMENTS ACCOUNT</u>						
Capital Gains (Losses) -Real & Unreal.	\$ 54,234.28	\$ (82,198.00)				
Total Interest & Dividends earned	\$ 5,259.61	\$ 16,967.00				
Gross total return on investments	\$ 59,493.89	\$ (65,231.00)	\$ 18,012	\$ 16,711	\$ 7,930	
(UUCEF Fund expenses)	\$ (2,515.76)					
Net total return after expenses	\$ 56,978.13					
Net annual return on UUCEF fund investment	<u>26.8%</u>	<u>-22.5%</u>	<u>6.7%</u>	<u>7.0%</u>	<u>4.5%</u>	

ENDOWMENT FUND – cont.

Assets & Liabilities	31-Dec-09	31-Dec-08	31-Dec-07	31-Dec-06	31-Dec-05	31-Dec-04
Cash in bank account (RBC Centura)	\$ 1,980.81	\$ 1,164.00	\$ 569.40	\$ 1,459.00	\$ 3,637.48	\$ 4,368.67
UUCEF (formerly UUA GIF) market value	\$ 263,000.92	\$ 212,507.03	\$ 289,969.09	\$ 269,457.00	\$ 237,685.30	\$ 174,557.58
Loan to church - paid off in 2006	\$ -	\$ -	\$ -	\$ -	\$ 9,958.98	\$ 13,912.00
Total assets	\$ 264,981.73	\$ 213,671.03	\$ 290,538.49	\$ 270,916.00	\$ 251,281.76	\$ 192,838.25
(Total liabilities)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<u>UU Sarasota Endowment Fund Net worth*</u>	<u>\$ 264,981.73</u>	<u>\$ 213,671.03</u>	<u>\$ 290,538.49</u>	<u>\$ 270,916.00</u>	<u>\$ 251,281.76</u>	<u>\$ 192,838.25</u>

Cumulative Endowment Fund contributions to UU Church of Sarasota Operating Fund	\$ 34,000.00	\$ 20,000.00	\$ 20,000.00	\$ 15,000.00	\$ 10,000.00	\$ 5,000.00

Notes

*In 2007, a beloved member quit-claimed her home to the church, retaining a life estate. The value of the remainder estate will accrue to the foundation at the time of the member's death. It is not included in these numbers.

** No bank interest received because we now have an account that pays us no interest and charges us no fees

*** In 2009 the church received a substantial (\$200,000+) annuity asset (The Lexow Annuity). The church board intends to transfer this money to the endowment fund in 2010. The amount is not included in these numbers.

MEMBERSHIP/ GROWTH AND DEVELOPMENT REPORT

The Membership Committee serves to provide an inclusive and friendly experience for visitors and prospective members. Members staff the Welcome Center where we greet our visitors, provide nametags, and offer information about the church. We invite newcomers to get better acquainted following the Sunday services at a “blue” table in the courtyard.

Prospective members are encouraged to attend an orientation, “Discovering UUCS,” currently held three times each year, prior to becoming members. Thirty-five people signed the membership book in 2009, and eighteen have joined so far in 2010.

Census information is kept for the church and reported annually to the UUA, and member’s subscription information to *UU World* is updated regularly.

A major focus of our monthly meetings is on ways to keep new, long-time and part-time members active and involved in the life of the church. All members and friends are welcome to join the committee.

Joanne Curtis
Membership Chair

**Unitarian Universalist Church of Sarasota
Census Report
March 1, 2010**

Membership reported to UUA as of 1-29-10 299

Members added after 1-29-09:

Lisa & Howard Altschwager (1-30-10)	2	
Wanda Brunner (1-30-10)	1	
Gail & Dave Coppock (1-30-10)	2	
Madeline & Andrew Hardie (1-30-10)	2	
Sandra & Monte Hayes (1-30-10)	2	
Allison Henley (1-30-10)	1	
Lynda Hill (1-30-10)	1	
Charlene Hovatter (1-30-10)	1	
Pat Owen (1-30-10)	1	
Joan Siegel (1-30-10)	1	
Sandra Zannino (1-30-10)	1	
Mary Mohr (2-13-10)	1	
Marilyn Kucharski (2-14-01)	1	
Arline Leven (reinstated 2-19-10)	1	18
	1	

Special member moved to regular member: 1

Members deleted after 1-29-10:

Died:		
Sam Horst (2-13-10)	-1	
Moved:		
	0	
Resigned:		
Dennis Shaw (2-24-10)	-1	
Removed:		
	0	
Became emeritus:		
	0	
Became friend:		
Kathy Laenhue (2-24-10)	-1	
Roy Truby (2-28-10)	-1	
Golden Clifton (2-28-10)	-1	-3
	-1	
Became dual members - other church primary	0	
Became special members:	0	-5
	0	

Reportable membership as of 3-1-10 313

Special members (local membership only, not reported to UUA) 5

Total reportable and special members as of 3-1-10: 318

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Emeritus members:

Rachelle Avril	1	
Francis Beecher	1	
Rose MacKenzie	1	
Helen Rhinehart	1	
Delores Steinecke	1	
June Snyder	1	
	1	6

Dual members - other church primary:

June & Don Brady	2	
Ilene Gillespie	1	
Virginia Burlingame	1	
Carol Malone	1	
Helene Reeder	1	
Sarah Risher	1	
Suzanne Naples	1	
	1	8

Friends:

Denise Barth	1
Virginia Chambliss	1
Golden Clifton (2-10-10)	1
Kimiko Crawford (2-28-10)	1
Nancy DeLong	1
George Gannett	1
Gayle Gottsche	1
Danielle Green	1
Judy Helgager	2
Brett & Jennifer Highland	2
Tom & Beth Hollingsworth	1
David Jemison	1
James & JoAnn Kelly	2
Lisa Kramer	1
Marilyn Kucharski (became member 2-14-10)	
Kathy Laenhue (2-24-10)	1
Arline Leven (became member 2-14-10)	
Joan Mahon	1
Dominic & Roberta Martia	2
Theron McClure	1
Carolyn Meeker	1
Art & Pat Morrill	2
Stan Nikkel	1

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Friends (continued):

Madelyn Nordmark	1	
Dorothy Okray	1	
Genevieve Perkins	1	
Gerry & Mary Preston	2	
Nancy Richardson	1	
Terry Ripmaster	1	
Debbie Schultz	1	
Louise Stinespring	1	
Nancy Stone	1	
Ann Sullivan	1	
Roy Truby (2-10-10)	1	
Peter & Nancy Van Roekens	2	
Rob White (2-11-10)	1	41
	1	

Registered youth (as reported by Ginny Griese 1-10-10) 37

Total congregation as of 3-1-10 410

Summary as of 3-1-10:

Reportable members	313	
Special members	5	
Emeritus members	6	
Dual members - other church primary	8	
Friends	41	
Registered youth	37	37
Total	410	

**Unitarian Universalist Church of Sarasota
Census Report
March 1, 2010**

Summary of changes after 1-29-10:

Reportable members:

Membership reported to UUA as of 1-29-10	299	
Net change in reportable membership after 1-29-10:		
New members added	18	
Special member moved to regular member	1	
Members deleted:		
Died	-1	
Moved	0	
Resigned	-1	
Removed	0	
Became emeritus	0	
Became friends	-3	
Became dual members - other church primary	0	
Became special members	0	
	-5	14
Reportable membership as of 3/1/10		<u>313</u>

Total congregation:

Total congregation as of 1-29-10:		
Membership reported to UUA as of 1-29-10	299	
Other categories as of 1-29-10	95	394
Changes 1-29-10 through 3-1-10:		
Net changes in reportable membership after 1-29-10:	14	
Net changes in other categories:		
Decrease in special members	-1	
Increase in dual members - other church primary	0	
Increase in friends	3	
Increase in registered youth	0	
	2	16
Total congregation as of 3-1-10		<u>410</u>

ARCHIVE

Richard Happy and Jim Raudabaugh continue to collect material for the church history begun by Furman Arthur. We add documents to the church archive files and welcome items about members of our church and church related events.

ARTISANS

The Artisans are a small but enthusiastic group who meet every Wednesday during the year, creating articles to sell at the Holiday Craft Fair. This year the fair was held on Saturday December 5, 2009. We also created the decorations and centerpieces for the Stewardship Dinner which was held on February 6, 2010.

Members of the Artisans who contribute their time and talents are Gail Colella, Jane Grundy, Diane Happy, Esther Martin, Terry Murphy, Nancy van Roekens, Phyllis Stevens and Phyllis Wynne

We are always looking for new members; so if you are so inclined, please join us in the Jefferson Room on Wednesday mornings at 9:30 AM

*Nancy Sciore
Chair*

ARTS COUNCIL

The Arts Council meets the first Saturday of every month in the Church Gallery. All Church members interested in any of the arts are welcome to join.

The mission of the UU Arts Council is to provide opportunities for artistic expression and appreciation within the church and work within the following guidelines:

- organize and manage exhibits in the South Wing and Jefferson Room, giving scheduling preference to member artist;
- initiate, stimulate, and promote events involving the arts as part of programming for children and adults;
- facilitate and encourage the inclusion of artistic expression as part of church programming;
- review proposed gifts of art works and their location, making recommendations to the Board of Trustees
- and consult on matters of general beautification of the Church buildings and grounds as stated in the Church by-laws.

The Council sponsored ten exhibits this year including the very successful holiday gift show *Artful Giving* and was a catalyst for the formation of the *Aesthetic Task Force*.

