



**Expression of Interest by  
Candidate for Clerk**

**Anne Perry**

- 1. Among the duties of the Clerk is the responsibility to record and distribute accurate minutes of Board and Congregational meetings. In addition, the Clerk maintains the master copy of the current policies by recording amendments and ensuring these are made available to the Trustees, the Senior Minister, and the Congregation. Why are you interested in serving as Clerk on the Board of Trustees? What skills do you bring to this position?**
- I have two years' experience taking and distributing minutes of Board of Trustees and Congregational meetings. Each month the Board of Trustees approves the minutes of the previous meeting after having time to review them. Once approved, I send them to the office for posting on the church website within a few days of their approval. The Annual Meeting minutes are required to be posted in DRAFT form within 30 days of the meeting (Bylaws Section 4.9 Minutes). While members have the right and one could argue responsibility to submit corrections, I have received none. I've been involved in creating and updating First Unitarian policy and bylaws for more than 10 years. The 'unstated' important role of the Clerk going back decades is bringing church history to the Board's deliberations. I've been involved with First Unitarian since 1995 and active in leadership going back to the interim period after Rev. Richard Gilbert retired. I was also active in First Unitarian in 1959-63 when I was in high school.

**2. The Board is a Policy Governance model. What skills and strengths do you bring to support this model?**

- I was on the Board when we made our first attempt at implementing Policy Governance in the period 2008-12. We made some novice mistakes. As Treasurer in 2016-19, I was involved in the re-implementation of Policy Governance. This time, our Board of Trustees and Interim Minister engaged an experienced consultant who has worked with the Board ever since. The process we used to create values, mission and ends was called Our Road Ahead and appropriately listened to the congregation. The Board was very disciplined about making sure that all the results were based on the comments made during the Our Road Ahead workshops. Since then we continue to implement Policy Governance. During this period I worked with John Solberg and others to update our policies. Subsequent to John completing his Board term, we have updated the policies by adding a Board of Trustees Policy Governance Committee that is required to review our policies on an ongoing basis, recommend updates to the Board of Trustees and to hold congregational forums twice a year that ensure that “the congregation has an appreciation for the governance framework, and that congregants have the opportunity to understand its practical operation in the life of the church.” (from Governing Policies, Appendix C.) The Board also is doing an annual survey as a systematic way of hearing from the congregation.

**3. What part of the work of the Board are you most passionate about and hope to be involved in?**

- I expect to continue to be involved in Policy Governance.

**4. Describe your experience working to consensus, representing and helping to implement policies which may differ from your own original concepts.**

- As Treasurer I was involved in figuring out how the church would pay for the new roof. After reviewing existing funding sources, I invited about 35 congregants who I knew were both very interested in church finances and opinion influencers to brunch in Williams Gallery. After Rev. Joel Miller described the current status of the roof project, the anticipated price tag and the existing financial resources, I invited the participants to discuss at their tables whether to have a capital campaign or ask the congregation to authorize use of endowment funds. I was clear that either answer would be fine with me. 24 of the 25 participants agreed that it was a bad time to do a capital campaign and we should use the endowment. Between then and the congregational meeting where the issue came up, I held two more forums that were open to all. These provided opportunities for people to ask questions. At the congregational meeting, the questions raised focused on the warranties. The congregation voted to approve use of the endowment.

- Another example was a couple years ago when the Board was having a retreat with the policy governance consultant and we had gotten to the parts of the Governing Policies that address financial responsibility and the role of the Treasurer. Our starting point was the actual role of the Treasurer that I fulfilled at that time. At the end of a long meeting, the consultant and I engaged in a 20 minute debate about the role of the Treasurer. (*I probably totally annoyed the rest of the Board.*) On my drive home, I got it and sent proposed policy language to the consultant. Her comment back to me was along the lines that she had never had the experience of seeing someone completely change their perspective like that.

**5. Describe your participation in this church (past and present) and other relevant community or work organization.**

- Born a UU – my father was a Unitarian minister, Rev. William P. Jenkins, who was minister of our church 1959-62 during the time the current property was acquired and the building was built.
- Active in Unitarian Churches in Toronto and Rochester from birth through high school.
- After 32 years as a “none”, returned to Rochester in 1995 and joined choir; joined church in 1997.
- Active with FirstLight Players, participating in many dramatic productions, such as A Man of No Importance, Death Takes a Holiday and Leap of Faith, as actor/singer/etc and as producer.
- Connect & Breathe representative to the Social Justice Council for several years.
- Investment Committee member (2014-2020)
- Financial Advisory Committee to the Board of Trustees (2015-2019)
- Three months as volunteer Controller followed by two years as Asst Treasurer. (2014-16)
- Three years as Treasurer (2016-2019)
- Two years as Clerk (2019- )
- Participant in R3 activities, Jubilee and plan to do Beloved Conversations.
- Soul Matters participant, facilitator and packet writer.
- Two years as President of the Congregation (2010-12)
- Two years on Board of Trustees (2008-10), including one year serving as Vice President.
- Transition Team 2002-2004, worked with David Keyes.
- Unofficially known as the “minister of food”. Events include such things as hosting Thanksgiving dinner 10 years, Legacy Society dinner/receptions, RAIHN breakfast with tweens, all-church pancake breakfasts, etc.
- Four years on the Board of Unirondack – served as treasurer. (1997-2001)

**6. Which service do you generally attend?**

- Currently, I attend 10 am virtual services and post service conversations. When in person, I like to attend at 9:30 but I attend at 11 when singing with the choir. I also enjoyed Soul Assembly. I am intentional about doing activities that involve children and youth so that I

get to know a broader group of the membership, including the fall multi-generational Unirondack weekend.



At Unirondack age 15.