

Winchester Unitarian Society  
Annual Report  
2019-2020

153<sup>rd</sup> Annual Meeting

Sunday, May 31, 2020

Meeting convenes at 11:45 am (via Zoom)



Winchester Unitarian Society

478 Main Street

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[www.winchesteruu.org](http://www.winchesteruu.org)

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# Warrant for the 153<sup>rd</sup> ANNUAL MEETING of the Winchester Unitarian Society

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Sunday, May 31, 2020  
Meeting convenes at 11:45 a.m.

The 153<sup>rd</sup> Annual Meeting of the Winchester Unitarian Society will be held via ZOOM at <https://tinyurl.com/WUSworship> on May 31, 2020, following the Sunday service, to consider the following:

- Article I** To hear and act on the Co-Treasurers' Report for the Fiscal Year ending August 31, 2019, and the Co-Treasurers' Estimated Report for the year ending August 31, 2020.
- Article II** To hear and act on the preliminary budget recommended by the Standing Committee for the fiscal year ending August 31, 2021.
- Article III** To hear and act on the Report of the Nominating and Leadership Development Committee, and to elect officers and committees for the ensuing year.
- Article IV** To authorize that there be raised and appropriated from the income and receipts of the Society, including the Sunday collections and funds obtained by general solicitation or otherwise, such amounts as may be necessary or appropriate to meet the expenses, debts, or other charges of the Society during the fiscal year ending August 31, 2021; and that the Co-Treasurers be and are hereby authorized, subject to the approval of the Standing Committee, to borrow from time to time, for a period not to exceed one year, such amounts as may be necessary and appropriate to meet the expenses, debts, and other charges of the Society during the fiscal year for which provision has not otherwise been made.
- Article V** To call a special meeting of the congregation on or before September 30, 2020, or as soon thereafter as is safe and practicable, to review the preliminary 2020-2021 budget and to conduct any other business of the Society.
- Article VI** To hear and act on any other business that may legally come before this meeting.

*By order of the Standing Committee, Mary T McIntosh, Clerk*

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**152<sup>nd</sup> ANNUAL MEETING Minutes**  
**Winchester Unitarian Society**  
Sunday, May 19, 2019

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1. Martin Newhouse, moderator, established that a quorum was present and called the meeting to order at 12:20.
2. Marianne DiBlasi shared a blessing. Heather Janules shared opening words, including remembrance of members who have passed on.
3. Martin Newhouse prefaced the meeting with remarks regarding civil debate, traditionally recognized and honored by this society. He briefly reviewed Roberts Rules of Order, which this meeting will follow. He also noted that Article XI in the Warrant was inadvertently left out due to clerk's error.
4. Moved and seconded that the reading of the minutes of the May 20, 2018 Annual Meeting be waived and minutes accepted as written. Voted unanimously for approval.
5. Moved and seconded that the reading of the minutes of the December 9, 2018 Special Meeting be waived and minutes accepted as written. Voted unanimously for approval.
6. Moved and seconded that the reports of the Minister, Heather Janules; the Church Administrator, Alison Streit Baron; Director of Youth Ministries, Sam Wilson; Music Director, John Kramer; Trustees of Permanent Funds and the Standing Committee be accepted as written. Voted unanimously for approval.
7. Moved and seconded to accept the Treasurers' Report for the Fiscal Year ending August 31 2018, and the Treasurers' Estimated Report for the Fiscal Year ending August 31, 2019. Voted unanimously for approval.
8. Moved and seconded to approve the Standing Committee's recommended budget for the fiscal year ending August 31, 2020.
  - a. Judy Murray presented the budget and began by referring the meeting to the Draft Budget on pages 36 and 37 in the 2019 Annual Report.
  - b. Judy outlined the highlights of this year's budget conversation.
    - i. SC has prepared a deficit budget for FY20. It was an iterative process involving the Budget Team, the Personnel Committee, program staff, Program committees, 2 congregational reviews, a final review and now approval by members.
    - ii. Income sources were reviewed, included pledges, other contributions which comprise 60% of income, permanent and endowment funds dispersements, increased rates for leases, fundraising expectations and concert series.
    - iii. Fundraising is on a 3-year cycle (auction, dine-around, and rummage). Next year's estimate is ambitious at \$25,000 based on an auction.

- iv. Income total is about \$25,000 more than current FY because pledges are up, 3 years of robust returns for unrestricted endowment funds, increased lease rates, and auction fundraiser.
  - v. Expenses were reviewed, including personnel, building and grounds, operations, program support and social outreach.
  - vi. Personnel covers 73% of all expenses. Budget includes 2.5% cola increase to compensation for all full and part-time staff as well as hourly teens. The budget includes an estimated salary and benefits line for the soon-to-be-vacant Church administrator position based on UUA mid-range salary for administrative positions.
  - vii. Building and Grounds budget was determined by averaging costs of last three years operations.
  - viii. In the past 7 years or so, committee budgets have been overbudgeted. This year's budget is based on the average of the past 3 years' actual expenditures. If a committee finds that their budget is too low, they are encouraged to work with their Standing Committee liaison to request more funds from undesignated capital reserves to be released by the Standing Committee.
  - ix. In total, operating expenses are up by \$3300 due to increases in personnel costs, building and grounds, operations, UUA dues, and social outreach grants, but reduced by estimates for program committee spending budgets.
  - x. Proposed budget is presented with a \$8788 deficit. The budget includes a proposal to cover this deficit with undesignated capital reserves which have a current balance of \$71593. Last year's deficit was about \$30,000.
  - xi. Standing Committee is committed to building up certain designated reserves funds to meet future expense needs such as a financial review or sabbaticals. The Treasurers are actively managing rainy day funds; for FY20 we are reallocated undesignated reserves to designated reserves.
- c. As there was no discussion or questions, Martin called for a vote. Budget was approved unanimously, with a round of applause.
9. Motion was made To authorize that there be raised and appropriated from the income and receipts of the Society, including the Sunday collections and funds obtained by general solicitation or otherwise, such amounts as may be necessary or appropriate to meet the expenses, debts, or other charges of the Society during the fiscal year ending August 31, 2020; and that the Treasurer be and is hereby authorized, subject to the approval of the Standing Committee, to borrow from time to time, for a period not to exceed one year, such amounts as may be necessary and appropriate to meet the expenses, debts, and other

charges of the Society during the fiscal year for which provision has not otherwise been made. The motion was seconded. Voted unanimously for approval.

10. Motion was made and seconded that the nominations be closed and that the clerk be instructed to pass one ballot in favor of the slate presented by the Nominating and Leadership Development Committee.

- a. Liz Lintz explained the slate and background including the empty slots in the slate (7 unfilled positions). Between 70 bylaw committee positions and non-bylaw committees there are about 130 people actively involved in service to the church. With committee structure based on an old structure when people's lives were different, getting people to agree to a 3-year commitment of monthly meetings is difficult. Revisiting the committee structure is something that is recommended. Growth and Learning Committee will be on hiatus this coming year; while they have been supporting adult spiritual growth, a lot of programming has been done outside of this committee.
- b. The Nominating and Leadership Development Committee will continue to work on filling the empty slots. Standing Committee will approve new members. Liz encouraged interested members to contact anyone on the Nominating Committee or Standing Committee, especially someone who has children or Religious Education experience for the empty SC slot.
- c. Issue was raised if a by-law committee is allowed to not meet for a year. If it is in the by-laws then yes it should exist but if you can't fill the positions, then by default it does not meet. The by-laws can also be amended if we decide the committee is no longer needed. A couple years ago most of the committees were downsized via the by-laws; and there is a current 3-year pilot to downsize the Social Action and Outreach to 7 members.
- d. Question was raised in relation to Growth & Learning Committee hiatus about Rebecca's role in lifespan education. Liz and Heather commented that there are a lot of areas where she can be involved in adult learning and asked the congregation to think about how they can engage with her.
- e. Martin called for a vote to approve the slate. Voted unanimously to approve.

11. James Pidacks and Judy Murray, on behalf of the Standing Committee and the congregation, presented flowers and hugs to Jennifer Edwards for her service as clerk this past year, and to Kathy Richardson for amazing job as chair of Standing Committee.

12. Moved, seconded and voted unanimously that the meeting be adjourned at 1:05 pm.

Respectfully submitted

Jennifer L. Edwards

Clerk

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**Report of the Parish Minister**  
**The Rev. Heather Janules**

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The Annual Report gives us an opportunity to reflect on the past year. Like every year, this year has been one of transitions.

We had the joy of welcoming Thomas Slack as our new Coordinator of Administration and Communication. Marianne DiBlasi completed her second of two years of intern ministry. After five years of service, we bid farewell to Haley Wegner as our Assistant Director of Youth Ministry (while happily enjoying her on-going presence as a member of the congregation.)

The hardest transitions were those we lost to death – Michael Costa, after a long struggle with cancer, and Linda Reck and Madeleine Smith, both from a quick decline as a result of contracting COVID-19. With restrictions against gathering in person, it is unclear how and when we will be able to celebrate Linda and Madeline’s lives through a memorial service.

This year, Director of Lifespan Religious Education Rebecca Kelley-Morgan notified us that she will remain in her role until Spring of 2021. As she named in her announcement to the congregation, she wanted to share this decision before “budget discussions reflecting realities of membership demographics and the financial profile of the congregation.” This coming year, the Visioning Team, emerging from the Staffing Analysis group, will make recommendations for how we might continue our ministries with children and families through different, more financially sustainable staffing models.

While it has been a fraction of this program year so far, the most noteworthy event has been the global coronavirus pandemic, emerging mid-March. The financial, psychological and social impact has been significant and it is unclear how and when it will be safe to return to “normal” life again.

Thus, in a short period of time, WUS leaders have needed to rethink how we engage in congregational life and intuit what messages and ministries are needed in this time. This learning process continues. Perhaps the best lesson we have learned so far is that a congregation is not its building but its people and that sacred space dwells in our sanctuary and also far beyond. We have responded to this crisis in so many compassionate, generous and life-giving ways. I am inspired by how we have lived our values in a time that is so uncertain.

### **Minister's Discretionary Fund Summary**

The Minister's Discretionary Fund is a resource that grants the WUS minister the ability to assist people in need "at their discretion." While generally intended to benefit members of the congregation, this fund also benefits people in the community-at-large. Here is a summary of deposits and withdrawals for FY20 to date:

The fiscal year began with a balance of \$3,199.54. To date, there have been \$3,108.63 in expenses (grocery gift cards for local community members in financial need, holiday cards for incarcerated Unitarian Universalists, donation to Council for Social Concern, reimbursement to members for supplies for special projects, donation to Woburn High School Dollars for Scholars program, financial support to members who have been impacted by the pandemic and supplies to the local refugee family we have been supporting.) There have been donations in the amount of \$8,039.17, leaving a balance of \$8130.08.

I am extraordinarily grateful to the many who have contributed to the Fund as the pandemic emerged. In our survey of the congregation, we learned of three households that have been negatively impacted by the shutdown. Since then, we have provided \$200/month to each household, with the request that they let us know if their need increases or decreases. This support will continue until there is no longer this supplemental need or resources run low. I encourage anyone and everyone who is struggling as a result of the pandemic to let me know so we can provide assistance. We are in this together.

And here are some highlights from the activities of my ministry this year:

#### **Worship and Rites-of-Passage**

- This year, we made a small change to our liturgy by adding an Affirmation of Shared Ministry to follow the offering:

*We gather not for ourselves alone, but to use our common power to build the Beloved Community within and beyond these walls. We create and reaffirm this covenant this day - to make justice flourish, to practice compassion amidst difference and to embody transformative love.*

This Affirmation replaces the Offering Dedication, a blessing the worship leader would say over the collection. The motivation to make this change was to "democratize" the blessing, acknowledging that all of us are joined in the mission of our congregation. By saying these words together after the offering, we proclaim that our resources, financial and otherwise, contribute to our "common power." And we name how we choose to use this great power.



While not a formal covenant, the Affirmation is a reminder and regular promise to one another of what calls us together.

- We also made a significant change in our platform for sharing worship. March 8<sup>th</sup>, 2020 was the last time we worshipped together in person. Due to the rising concerns about the Coronavirus pandemic, we shifted to an on-line broadcast of the service from the sanctuary on March 15<sup>th</sup>. For the March 29<sup>th</sup> service, we began broadcasting from our homes. As of mid-May, the scientific information currently available confirms we should broadcast from home for the rest of the fiscal year and suggests this should continue into next program year. Making this change was not our choice but we did choose to prioritize the health and safety of worship attendees. For this, I am grateful.

Virtual worship presents a number of pros and cons:

- Pros
  - The ability to worship with people at a great geographic distance and/or home bound regardless of the pandemic
  - The freedom to employ visual images in creative ways
  - Virtual worship gives newcomers the freedom to explore our congregation from the comfort of their homes
  - Recorded services can be viewed at a later time
- Cons
  - Virtual connection is both more intimate (we see into each other's homes, we have a closer look at each other's faces) and less intimate (no tactile contact, limited ability for spoken conversation)
  - Choral music is difficult to produce and very labor-intensive, requiring pre-recording for broadcast to be possible

At the juncture when it seems appropriate to consider resuming "analog worship," I encourage us to carefully consider ways to retain the gifts of on-line worship so we can continue to share our worship ministry with greater reach.

- This year, I led or co-led a number of rites-of-passage
  - Memorials
    - I co-officiated the memorial for Michael Costa
    - I led a non-member memorial for a member of my previous congregation
  - Weddings: I officiated one non-member wedding
  - Additional rites and blessings:
    - The Black Lives Matter Flag Rededication

- A member house blessing
- A member animal blessing
- Rededication of our renewed entryway, parking lot and stairlift

### **Pastoral Care**

Beyond visiting and meeting with members, friends and newcomers about their pastoral concerns, I

- Worked closely with our Pastoral Care Associates team, providing consistent support to individuals in on-going need and responding to temporary member concerns
- Met with a non-member family to discuss a family member's wishes for her end-of-life process

When the pandemic emerged in mid-March, I:

- Organized outreach to all members and friends to assess household needs and gifts. This process was followed by a pastoral letter.

### **Spiritual Development**

- In collaboration with Rebecca Kelley-Morgan, Sarah Milt and Karen Caputo, I arranged for Our Whole Lives leaders to make a presentation to the Winchester Coalition for a Safer Community to make community leaders aware of this transformative program.
- Co-facilitated a monthly Soul Matters covenant group based on the monthly themes
- Organized a one-day Silent Retreat in January
- Co-led the Membership Reflection and Renewal Retreat
- As part of the committee of the Winchester Public Library that selects the annual Winchester Reads book, assisted in selecting "The Sun Does Shine" as our 2020 book.
- By the time this program year concludes, I will have led a six-session on-line class, reflecting on the philosophical and spiritual questions raised by the television program "The Good Place."

### **Social Justice**

- Participated in and led a prayer during an interfaith vigil at the South Bay Immigration Detention Center
- Partnered with Network for Social Justice to launch a rainbow campaign, inviting residents, schools and businesses to post rainbow flags and decals in support of the LGBT community. This was in response to the numerous acts of homophobic vandalism of WUS property.
- Engaged the community-at-large about our vandalism through a letter-to-the-editor of *The Winchester Star*

- Organized regular distribution of resources from the Ministers Discretionary Fund to members whose income has been impacted by the coronavirus pandemic

### **Administration**

- Joined the program staff and some members of the SC Exec in a leadership retreat in the Fall
- Met regularly with program staff: Thomas Slack, Rebecca Kelley-Morgan, Sam Wilson and John Kramer
- Met weekly with student minister Marianne DiBlasi as part of the internship process
- Regularly attended committee meetings: Standing Committee, SC Executive Committee, Personnel Committee, Committee on Shared Ministry, Membership Committee, Social Action and Outreach Committee

### **Service to the Larger UU Faith**

- Served as a Good Officer to colleagues, a “minister to minister” in situations of conflict or concern
- Co-led a meeting with the rest of the Good Officer team for our clergy chapter
- Became a member of the UU Society for Ministerial Relief
- Was elected co-moderator of the Greenfield Study Group

### **Beyond the Congregation**

- Regularly attended the Winchester Interfaith Council
- Attended Winchester Coalition for a Safer Community meetings

### **Continuing Education**

- Continued monthly meetings with my clergy coach and clergy support group
- With Marianne DiBlasi, attended a UUMA Ministerial Formation Network retreat for student ministers with marginalized identities and their supervisors
- Continued participation in the Greenfield Study Group. In the Fall convocation, I submitted a paper reflecting on the possibility of forgiveness and reconciliation in US race relations.
- Attended a workshop led by the National Alliance on Mental Illness, “Bridges of Hope,” focused on how faith communities can support individuals with mental illness and their families

As always, it is my great privilege to serve the good people of the Winchester Unitarian Society and beyond as your minister. While the immediate future is unclear, I am confident we will travel together with the community’s hallmark resilience, creativity and compassion.

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## Report of the Intern Minister Marianne DiBlasi

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As I reflect back on my two-year part-time position as the intern at Winchester Unitarian Society, I am filled with gratitude for the breadth and depth of learning I have been blessed to experience by this generous congregation. I am grateful WUS is committed to being a Teaching Congregation who nurtures the formation of ministers with tremendous grace, wisdom and care! It's been my honor and great joy to serve as your intern minister. May the Winchester Unitarian Society continue to flourish through the dedication of strong leaders and congregants with big hearts and willing hands because the world needs places where generous, kind-hearted, spirit-filled community thrives.

Based on my learning agreement with WUS, here is summary of some of the experiences and learnings I have been blessed to experience this year.

### **Worship and Rites of Passage**

As the ministerial intern at Winchester Unitarian Society, I participated in the weekly worship planning meeting. I actively engaged in offering constructive feedback in debriefing the previous Sunday worship service and collaborating with the worship team to plan the upcoming services. As a member of the worship team, I participate in selecting hymns, readings, prayers and designing rituals that are in alignment with the spiritual message of the worship service. During the COVID-19 pandemic, I collaborated with the worship planning team to re-design the service and do rehearsals before offering an online Sunday worship service.

I have planned and led the worship service four times. Every Sunday, except my Sunday off or when I'm at Meadville, I have led various worship elements including: opening words, prayer, reading, time-for-all-ages, rituals, and commissioning ceremonies. In the area of rites of passage, I have officiated a child dedication for a non-member of WUS and a memorial service for a non-member of WUS and co-officiated the memorial service for Michael Costa.

### **Pastoral Care and Presence**

Following the worship service, I stand in the receiving line with the minister to greet and have conversations with members and visitors. I enjoy continuing conversations during social hour. I am an active participant in the many social events at WUS: whole community potlucks, youth group fundraisers, musical performances, and events by community partners. At these events, I am attentive to connecting with members and talking with newcomers. I have a keen ear for hearing concerns during conversations and committee meeting check-ins. I often follow up

with people via email, a phone call, or a card. Additionally, I have visited members of the congregation who are homebound and do not attend Sunday worship services.

I regularly attended pastoral care associate's meetings and provided the team with relevant knowledge acquired from personal and professional experiences. In particular, I offered helpful information about available community services for elders.

During the Coronavirus pandemic, I collaborated with the minister and staff to develop ways to create online connections with the community and participating in an all-member outreach campaign to contact every individual/family to do a needs and gift assessment.

### **Spiritual Development for Self and Others**

To support my spiritual development, I engage in a daily spiritual practice of meditation and journaling on gratitude and compassion. I trust this spiritual practice has helped to reduce stress related reactions, while enhancing a non-anxious presence. Additionally, I participated in a Spiritual Direction group for UU seminarians facilitated by Rev. Jade Angelica.

Heather and I co-facilitate a monthly small group ministry Soul Matters covenant group. I regularly attend the interfaith clergy gatherings, a group of religiously diverse, warm and welcoming individuals.

As part of an end of life series of workshops offered by the Pastoral Care Associates (PCA) team, I collaborated with a PCA and the Dir. of Lifespan Education to design a two-part program, Creating Your Spiritual Legacy. Twelve people participated in reflective discussions about what a spiritual legacy is, why write one, to whom, and when.

WUS has a strong committee culture of creating a covenant at the beginning of the church year, lighting a chalice, having an opening reading, and doing a check-in. It's a pleasure to minister with a congregation that values setting a spiritual context for doing the business of church. At the intern committee meetings, each month a member shares their spiritual journey. This has been a wonderful way to deepen relationships with committee members and to discover the variety of spiritual paths people have traveled to become and to be a Unitarian Universalist.

### **Social Justice in the Public Square**

I have participated in the social action, racial justice, and Sanctuary taskforce meetings and events. I attended a Decentering Whiteness workshop led by member of the UUA New England Regional Staff, which was hosted at WUS.

Per Meadville-Lombard Theological School's curriculum for the 2<sup>nd</sup> year of an internship, I led a border crossing initiative that included partnering with a local non-profit which serves a demographic not currently represented in the congregation. After discussions with non-profits and discernment with WUS stakeholders (primarily the social action committee, sanctuary taskforce and racial justice taskforce), I moved forward with developing a partnership with Lexington Refugee Assistance Program (LexRAP) who provides a network of community support to assist refugees settle into the local community. This initiative was chosen to deepen and expand the congregation's immigrant justice efforts.

I fostered the initial vision and the formation of a core WUS-LexRAP team of 8 congregants. I was involved in planning and programming activities, while also guiding and developing lay leaders to take responsibility for various roles. Together, we developed:

- 1) A partnership with LexRAP, which included: WUS members attending monthly steering committee meetings, fundraiser dinners, community partner potluck, and including requests for \$50 Target gift cards for refugee children to the WUS holiday Mitten Tree.
- 2) A relationship between the congregation and a local LexRAP client family who is seeking asylum. Congregants volunteered to give rides to hospital appointments, have conversational English visits, provide assistance with employment and housing, as well as, purchasing tangible goods such as PediaSure, Huggies, and Christmas gifts.

Additionally, the WUS-LexRAP team designed and offered two community-wide events:

- 1) A family book discussion of *Refugee* by Alan Gratz hosted at the public library. This event involved collaboration with the racial justice taskforce, RE, the Dir. of Lifespan Education, and the public library. It was the first time WUS had offered an intergenerational, community-wide book discussion in collaboration with the public library.
- 2) Love Has No Borders: Storytelling and Music, a fundraiser event with proceeds to benefit LexRAP, offering the wider community a concrete, life-changing, educational experience that demonstrated UU faith-based values in action. The event included 5 storytellers and 4 musicians who shared various perspectives of refugee and immigrant related experiences, inspiring hope-filled action through the power of stories and music. It also included participation from interfaith houses of worship to promote their immigrant-justice programs, the Network for Social Justice, and the local independent bookstore to sell Abdi Nor Iftin's book, *Call Me American*.

Abdi is a refugee from Somalia and was the event's featured storyteller. Abdi and I were interviewed by a journalist of the local newspaper for an article. The article appeared on the front page of the local newspaper in a middle-upper class predominantly white community and featured a photo of Abdi, a black man from

Somalia. Unfortunately, Love Has No Borders had to be postponed because of the Covid-19 pandemic. However, because of this article, Abdi's important story was told, and Unitarian Universalist progressive values of immigrant and racial justice were shared in the wider community.

### **Administration**

WUS is a church with strong lay leadership and active committees who receive strong ministerial support, as demonstrated by the minister's attendance at many committee meetings. The culture of having and welcoming a ministerial presence at meetings laid the path for committees to enthusiastically welcome my participation. Therefore, I have had many opportunities to attend committee meetings to learn about and the goals and activities of the committee as it relates to the mission of the church. Committees I have attended include: standing committee, annual pledge drive, personnel, committee on shared ministry, nominating and leadership development, worship associates, building and grounds, pastoral associates, religious education, growth and learning adult education, membership, social action, racial justice and Sanctuary. Each month, I attend the standing committee and executive standing committee meetings. This has given me the opportunity to learn about the governance and financial operations of the church.

In addition to committee meetings, I attend the weekly staff meeting where staff members discuss pastoral concerns of congregational life, look back at the previous week, look forward to upcoming events, and discuss administrative, safety, and building issues.

### **Serves the larger Unitarian Universalist Faith**

As a member of a Ministerial Formation Network offered by the UU Ministers Assoc. (UUMA), I connect with other seminarians and interns each month where we deepen our understanding of what we are learning/experiencing and how it relates to ministry. This year, I joined an MFN group for folks with disabilities. This has been a supportive and valuable resource to navigate disability-specific issues as they relate to ministry. Additionally, Heather and I attended an MFN retreat for parish interns with marginalized identities and their supervisors. This was the first time this retreat was offered, and it was a valuable learning experience for both of us. We were able to contribute what we have learned together during the first year of my internship with the other participants.

I value attending the local UUMA chapter meetings where I have the opportunity to be in a learning environment with other ministers and develop collegial relationships with ministers in the local area. I have attended and participated in ordination ceremonies for ministers.

### **Leads the Faith into the Future**

When meeting a visitor during social hour, I am intentional about spending time with them and introducing them to members at WUS. I attended newcomer breakfasts and collaborated with the minister to facilitate sections of the New to UU retreats. I attend WUS events that are open to the wider community as a way of promoting WUS and our values beyond the congregation.

The WUS-LexRAP team decided to host the *Refugee* book group and Love Has No Borders events in secular venues in the community. The decision was made for two primary reasons: 1) to be more welcoming to members of the community from diverse spiritual traditions who may be reluctant to enter a different House of Worship. 2) Instead of inviting the community to come to WUS, we wanted to expand our outreach by WUS going out into the community – “WUS leaves the building.” An additional consideration for Love Has No Borders was to meet our fundraising and creating awareness of refugee/immigrant issues goals by maximizing the # of attendees. The team determined that hosting the event at the Jenks Center would significantly increase attendance. The rental fee for the venue was very reasonable and would only require an additional 15-20 attendees to cover the expense.

Although Love Has No Borders was canceled due to the COVID-19 pandemic, in the WUS-LexRAP debrief before my internship ended, I was pleased to hear the team’s enthusiastic commitment to host the event next year and expand the network of support for the LexRAP client family who is seeking asylum.

After each event or program that I led, I scheduled a debrief with the planning team and/or participants to ask: “What went well?” and “What could we have done differently?” In this way, the congregation was invited to reflect, learn and apply learning to improve future programming.

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### **Report of the Director of Lifespan Religious Education Rebecca Kelley-Morgan**

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It is impossible to write this year’s report without stating the obvious, that much of programming and worship which occurred up through early March seems like a lifetime ago and is a model to which we are unlikely to return to in the foreseeable future, even when we restart face to face gatherings, the offerings will not be the same until social distancing is no longer required. My retrospective on this past program year falls into Before Pandemic and After Pandemic



categories. The latter, thus far, contains a great deal of experimenting, some things “sticking”, some not.

I returned after last year’s Sabbatical to the congregation in June 2019, with great appreciation for Terry Currier, the members of the Religious Education Committee and Heather for keeping it together and running in my absence. As I did not submit an annual report last year to report back to the congregation on my Sabbatical, you will find Sabbatical reflections appended to this year’s report.

This past winter, the Core Committee reported back its conclusion that this congregation spends a disproportionate amount on its children’s, middle school and high school youth programs in an unsustainable staffing configuration. Although my work is not just with children, in this congregation, which is smaller and leaner than the one that hired me, my position is not financially viable. I submitted my resignation to the Standing Committee in early March. This decision was shared with the congregation after Marianne’s departure in April. I will be leaving in the summer of 2021, so we have time to make preparations and you have time to make decisions for your way forward. As I wrote when my resignation was announced to the congregation, I won’t leave in the middle of a pandemic.

**Sunday Morning Children’s programs:** Juanita Simms returned to the playroom to care for our youngest each week. Caroline O’Callaghan and Isabelle Kamikawa, led the pre-K-Kindergarten class, Charlotte Bradley and Elizabeth Sharon led the 2-4th grade class and I led the 5th and 6th grade class again this year, since we have not found another consistent leader for that group. We welcomed members of the Green Sanctuary committee to re-introduce recycling rules. Evan Forcucci returned as the program assistant - keeping order in the supplies and cheerfully managing pew packs.

In addition to leading Sunday morning classes, I wrote curriculum for all groups, using Unitarian Universalist resources to do so, but creating a more user and kid friendly structure and content, writing twenty two weeks’ worth of sessions for three age groups - 66 - 45-60 minute sessions in total.

I led our “whole program” mornings and took primary responsibility for the holiday pageant content and production. Many thanks, once again to the RE committee for setting up the costumes and for the members of WUSYG who took roles or pitched in to get our angels and shepherds dressed. In January, during Jan Fest, the RE committee recruited volunteer leaders from the community with support around the edges from me.

From September to early March programmed 15 weeks of curriculum based sessions before we began meeting virtually. After Stay Home orders, I offered “home-school” Religious Education sessions to families, but after the first sessions were distributed, feedback indicated that wasn’t a fit. Since March I have created pew/couch packs with activities for kids, context and liturgical practices parents might want to try, and a week's worth of daily suggestions until the following Sunday for all virtual worship services. In addition to the Sunday materials, I am building a virtual library of told stories (original work or out of copyright) to have available for our families.

**Potluck Theology:** Sponsored by the Religious Education Committee, Potluck theology met 4 times this year, 3 at WUS, 1 virtually. The evenings were well attended and consisted of a seasonal activity, and a theological or faith development “lesson” led by myself 3 times and by Swati Mukherjee on Divali.

**Parent’s Night Out:** The Religious Education committee sponsored this event, and I coordinated with childcare providers to arrange logistics and food, remaining until dinner was served.

**Middle School Programs:** This year we did not have critical mass for a 8th in Action program, and although we made a start in September with family interest, the lack of eighth grader interest put an end to the program by early October. Our Whole Lives was offered this year, although we had interest and verbal commitments from families, when late September came, a number of them opted out. We began with a class on the small side and over the course of the OWL program year, 3 students withdrew. The program has not concluded since the content and structure of Our Whole Lives is not appropriate for on-line education. When we are able to return to face to face meetings, we will assess the prospect of a program review and closure for the current enrollees.

**High School Programs:** I am not a regular presence at WUSYG, this year, I led programming in 2 meetings, one on intuitive collage and the other on implicit bias. I am also a primary point of contact for our teen teachers and the program assistant who I mentor and support in their leadership to younger people. I am on call as needed to advise on first reflections and write references on college and job applications.

**Growth and Learning programs:** Last year in my absence the congregation voted to put the Growth and Learning Committee of the congregation on hiatus. As the staff person attached to that committee, I approached several committees and put out a call for congregants to propose programming. We had several successful programs up through March. Matthew Bronski

envisioned and facilitated a monthly gathering to explore and discuss Joseph Campbell's "Power of Myth". The group was well received with solid attendance and continued interest across the year, moving to an online platform after Safe at Home orders. They conclude in June.

Along with Marianne DiBlasi and representatives from the Pastoral Care Associates (PCAs), I publicized and designed a two Part Spiritual Legacy program, also well received. I led two Soul Collage events, one for the silent retreat, and one as adjunct to the Spiritual Legacy program. A subset of PCAs and I also planned an End of Life Matters two part workshop scheduled for late March and April. It will be adapted and offered virtually later this spring. In mid-May, I started a 6 week writing group at our virtual meeting place.

**Pastoral Care:** I meet with the Pastoral Care Associates at their monthly meetings, work with members to identify and implement programming, and am available to families for support and resources as desired. After the death of my son, per NAMI guidance, I did not return to co-facilitation of the caregiver support group this year. Pastoral care weaves through family worship with sharing of happy and sad every week, with fellowship hour conversations and phone calls that start off as one thing and turn into another kind of conversation. I offered two parent support meetings each week through the month of April, but at that time there was little interest so they were discontinued at the beginning of May.

**Outreach:** Our Whole Lives leaders Karen Caputo, Sarah Milt and myself presented to the Winchester Coalition in September.

I coordinated with Planned Parenthood to bring a Parent to Parent speaker to an open conversation for parents of school aged kids.

Coordinated the annual mitten tree and delivered gifts to the Haverhill office of MassDCF.

In collaboration with the Racial Justice Book group and Network for Social Justice, organized a community conversation on Indigenous Peoples History of the United States in the fall.

Following afternoon Caroling and the annual Solstice ritual, I coordinated a community meal, since those are events that often have non-members at them.

With Brittany DeLorne of the Winchester Public Library and Marianne DiBlasi, publicized and coordinated a community book discussion on the young adult book "Refugee".

Met with Liora Norwich and Beth Levin to plan a Conversation on “A Interfaith Community Response to Othering.” Since it was to be held at the Jenks Center in May, we hit the pause button.

I could not have imagined that my Facebook post to the congregations’ members and friends back in March would elicit such generosity and become yet another vehicle, as Heather and the sewists took up the baton, of outreach in the greater community. I’m including these lines about our mask makers, because it should be noted.

**Worship:**

Through the year, I attended weekly worship planning meetings, for planning and coordination. I led the annual blessing of the animals service in late August.

September 15-March 8, Family Worship was offered at 10:00 am in the Chapel. I led 9 of those sessions, and supported lay leaders in leading the first Sunday October-March. Heather led the third Sunday service. On March 27th, we began to offer Family Worship late Friday afternoons. I took responsibility for 5 of those services, and contributed liturgical elements to the 6th. I wrote and led First Reflections for 19 services, several of those recorded for virtual worship. Along with responsibility for the content and organization of this year’s Holiday pageant, I was primary worship leader for the 4 PM Christmas Eve service, and for the April 19th virtual service. With Lily Kiewra led the Winter Solstice Ritual.

With Marianne, Heather, in consultation with John collaborated on All Ages in Worship Services Sept-April. Offered input to Sam and/or youth for First Reflections and WUSYG led worship as requested.

**Professional Development:** Along with meeting in the Religious Educators metrowest cluster on a bimonthly schedule, I meet twice a month with a peer group from Follen, Bedford and Arlington. I enrolled in the 8 month Sept-April Emergent Leadership Academy, with monthly intensives devoted to cultivating skills and best practices in religious leadership. As part of that work, I met weekly with an anti-oppression group for discussion, readings and reflection. With Heather, I attended a NAMI sponsored workshop for religious communities responding to mental illnesses. I am currently enrolled in the End of Life Doula program through the University of Vermont, with a Pandemic focus. I complete the program in July.

**Gratitudes:** Every year when I write this report there is a long list of people for whom I am deeply appreciative. Heather, John, Sam and Haley who bring humor and insight and deep devotion to their work. Our enthusiastic intern of the previous two years, Marianne. And a

shout out to the two Mikes and Joe, our sextons and the most essential of employees. Thomas and Jenny in the office, efficient, accommodating and warm. Thanks to our Sunday morning employees who get up early on Sunday and invest in this ministry. Thank you Naomi and Erin for leading the Religious Education Committee in the midst of other demands and to committee members Lucille, Karen, and Ryan. Thanks to John Russell for his wisdom, Ryan, Karen, Jenny and Sioux who facilitated the Our Whole Lives class through its most awkward moments, to Maggie and Lindy for caring so much about the planet, to all the people who volunteered, who made the spaghetti, for all who said yes. There are many more names that could be listed, and you have my thanks, each and every one of you.

**Sabbatical Reflections:** Although I spent less time on the road than I had planned and the weather conspired to keep me apart from proposed visits to intentional communities I had planned to visit, I did manage to get to a dozen other worship services and was able to speak with people about their motivation in their work, ministry or community.

In every setting, it is clear that religious education programs, or any programs for children and youth do not exist in a vacuum, but are a reflection of the congregation's membership involvement across all ages. Investment of time and energy reinforces investment of time and energy as well as multiplies it.

I attended 5 Christmas Pageants. Three were Unitarian Universalist, two United Church of Christ. One was a survey of holiday traditions from various world religions, the others were the nativity tale enacted by professional staff and/or volunteers. I didn't see anything that made me believe ours could be greatly improved upon by copying theirs. The most polished of these was at a large congregation and it was very much for and by the staff and members of that congregation, insider comments and all. The one that moved me the most was closer in spirit to what we do in Winchester. Although I did not participate, I felt very welcomed and very much a part of the story and celebration.

What I learned from one time winter visits to congregations was that for me, the quality of worship was less impactful than the peripheral experiences of welcome. There appeared to be a universal lack of attention/intention around how to welcome those, who for the first time, walked through the door. One Sunday I was coughing, yet no one offered me water or a lozenge, each visit, I had to ask where the bathrooms were (which for some is not always a comfortable question). At one congregation we were kept waiting in a tiny foyer while the choir rehearsed up until just before the service start time and it was obvious that we and the other visitors didn't get the memo, because the congregants streamed in as soon as the doors opened.

Everywhere I went, I identified myself as a visitor from "just outside of Boston", or in the case of more local congregations, my hometown. During the road trip, my spouse accompanied me to worship, which seemed to make a difference in how I was welcomed. On my solo trips I was largely ignored, as half of a couple, I experienced greater interest and more efforts to engage. At a large UCC church there were 6 greeters, all of whom were busy with each other, and when I asked where a visitor would be best placed in the sanctuary, got a shrug and a vague wave of the hand. At a small fellowship in California, two very chatty greeters engaged us in conversation, but interestingly enough, there were other first time visitors that day, who they did not connect us with even while we were standing closely together. In a larger California congregation, although I fit in with the older crowd - they all talked to each other. In Sacramento, I couldn't find any of the UU congregations that advertised on the web. The best welcome I got was at the Red Church (evangelical Christian) in Virginia Beach where I felt welcomed and accepted and under no pressure to join or accept Jesus. I experienced a contemporary, evangelical service, full of younger people and very alive. Contrasting their use of technology in worship with our UU experiences made me squirm. Better to not use it at all than to use it poorly. \*This observation was taken from my trip journal, and as we rise to the challenge of virtual worship and other programs, we should aspire to offer the best production values that we can.

There were other communities that I learned about and from as well. I spoke with volunteer rangers in national and state parks, during the government shutdown. I met artists and craftspeople who gave clues to anyone who could find their work in New Orleans #nolatreasurehunt, building community along the way. I explored canyons with a tiny group of archeologists who are (with scant resources and pay) trying to conserve endangered Pecos River art. We spent February in the Mexico/US borderlands where I was reminded that this was Spanish land, then Mexico until well into the 19<sup>th</sup> century and the inhabitants toppled from their place in history. The Angels of the Desert and other groups like them silently supported their companeroes who crossed the border and too often did the sad work of recovering bodies from the Sonoran and Chihuahua deserts. Wherever I visited and questioned, I found no end of willingness to speak passionately about the people and resource(s) each community was protecting, preserving and supporting.

I headed out on the sabbatical with a question "What creates and sustains community?" Before my travels, my research came up with two consistent themes – strong and charismatic leadership and something – institution or resource - perceived as precious. On my travels, that was true, for both liberals and conservatives. I also found people bonded more tightly around the sense of being othered and the belief that they and their community need to protect each other, in essence, communities under stress. Rescue and recovery groups to find migrants who

were lost or leave lifesaving water, the small community of St. Joe's decimated by Hurricane Michael and left behind by all the agencies in a few short months, the artists who are being priced out of their homes, the avid protectors of ecosystems in the Redwoods. It remains to be seen if communities that form under those circumstances can sustain themselves in the long run.

I learned other things along the way. Fishing is a big deal everywhere but the Northeast. There are remains of extraordinary cities that were inhabited by prehistoric groups on this continent. Bayous are rivers, and that we are stratified as a society, into racial groups, into socio-economic groups and into interest groups. But along the west coast of Florida we stumbled across one place where that was not true, Mary's Fish Camp. The story of Mary's is checkered, full of welcome and camaraderie, where rich or poor, fair skinned or dark, republican or democrat, local or "from away" fish side by side and where mullet reigns supreme. But Mary's story is also a tale of greed and legal difficulties as the ownership passed from the original hands into ones who wished to maximize profit. After a few legal acrobatics, including declaring Mary's a sovereign nation (that lasted just a few months) Mary's was going to be sold for payment of past taxes before being purchased by local business people.

Memory and tradition is strong around here, and one man in a nearby community called his friends. They all grew up fishing from the seawall at Mary's, with parents, grandparents and each other and after a few years they reopened Mary's. Today people come there to feed their families and wealthy people who fish for sport, hand their catch to someone who "needs" it. It is not posh, or modern, but it remains a haven for all who pay their small fee and rich or poor, fair skinned or dark, republican or democrat, local or "from away" fish side by side.

I knew I would be surprised by something that I had not anticipated during my travels and time away from you. That something came in a tsunami when the death by suicide of my youngest child, Jonathan, ended sabbatical travels early and abruptly. I extended my sabbatical time for an additional month, returning to the congregation in June, rather than May, as planned. In the months since, I've learned more than I ever thought I could about trauma, grief and loss and am still learning. I learned that grief's trajectory is not always smooth, and how to hold myself together with painted stones, gardens and will power. I learned that I can't move on, but I can move forward. And I learned that one of the things we do not anticipate when we are busy and healthy is the role of the faith community at the end of a life. Although Jon was not a member of this congregation or any other, it was a great comfort to his large group of family, friends and colleagues to be held in this space; to collectively mourn and to begin the process of integrating his death into the rest of our lives.

This is not true only for me, but for members and friends of Winchester Unitarian who also will need to be held and supported when inevitable or unbearable losses come. This is true for each of us, who is comforted by the fact that our loved ones will be held and supported when we pass from this world. If we want to continue those ministries, we need a robust religious community. Community takes time and patience to build. Sometimes it's unrewarding and boring, sometimes it is magnificent and vital. On the rainy March day when we remembered Jonathan, Winchester Unitarian Society was magnificent.

Much of what I have written about my sabbatical was taken from journals I kept during that time, but as I write this, there are new journal entries, ones from a pandemic, changing our personal and communal lives in ways we could never have predicted. People we know have died. Others will sicken and recover, or not. Livelihoods have been wiped out and future plans put on hold. The rituals surrounding births and deaths and all the rites of passage in between are no longer accessible in the same communal ways. None of us have an assurance of what will come next, only that these are challenges we will meet together. Together, even when we are apart.

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**Report of the Director of Youth Ministries**  
**Sam Wilson**

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### **Progress Related to Our Goals**

- In addition to our usual goals for WUSYG programming, we strived to do more planning ahead this year, in order to increase attendance and aid communication with parents/families.
  - o We worked hard at our first YAC meeting to create a calendar for the entire year (for the first time ever!)
  - o Our Service Trip Subcommittee worked hard last spring to finalize a plan for the service trip, that was then approved by the SC at their 1<sup>st</sup> meeting in September.
- We hoped to build more community with our parents
  - o This year we implemented parents' one-on-one meetings with Haley and me. Several parents used the timeslots that we provided at the beginning of the year, and since then we've had a few additional meetings with parents when necessary. Opening the door in the Fall helped facilitate holding these meetings later in the year, and, overall I think that this is a good idea to continue doing each year.
  - o We created a covenant between the parents and youth staff during our first service trip meeting with them in the Fall. Heather led us in expressing our



expectations for each other in order for all of us to minister to our youth most effectively. I was very pleased with the outcome, which seemed to have immediate effects on participation in our fundraiser a couple weeks later.

- We strived to create a process of retention: recognizing when teens hadn't come for a while, reaching out to them, etc.
  - o Haley devised a system for our records that highlighted when teens had not come for more than 3 meetings in a row. We still need a better process for trying to reengage them.

## **WUSYG Events**

- Weekly Meetings
  - o Each week we had approximately 20-30 teens come from 4:30-6:30 for our regular meetings. During our meetings we always start with a check-in, then we do business items, a fun physical activity, and a chalice lighting/reading before the main part of our evening, which varies in theme and content each week. Some of our topics and goals include: team building, bonding, learning about social justice issues, discussing current affairs, teenage development, sex ed, college prep, leadership development, youth empowerment, service trip prep, fundraising planning, worship planning, and much more!
  - o From March 15<sup>th</sup> on, we started holding these weekly meetings on Zoom: "Zoomsyg meetings"! At that point we also added weekly "Weekday Bonus WUSYGs" via Zoom. Our Zoomsyg meetings have been fairly well attended, with 15-20 teens most week, while our weekday bonus WUSYGs have more like 5-10. Content for all of our virtual meetings can be found on our shared doc: [www.tinyurl.com/virtuallyouthgroup](http://www.tinyurl.com/virtuallyouthgroup)
- Welcome Back BBQ
  - o We had another successful BBQ at the start of the school year. We attribute part of this success to sending out individualized postcards to teens to invite them to join us. We try hard to find all possible incoming 9<sup>th</sup> graders as well as any teens who had come once or twice to WUSYG in the past (I add notes to their postcards saying how much we'd love to see them again, etc.) We also created an updated "family handbook" that we gave out at this event. The handbook covers the basics of what families need to know about WUSYG, including its history, typical meeting schedule, communication info, info/timelines/pricing for service trips, etc.
- Fall Retreat
  - o We had another fantastic weekend at Buffalo Hill Farm in Oxford, Massachusetts. We had a great time bonding, playing games, doing a circle worship around the bonfire, making food, and doing a service project for the property.
- Service Trip Meeting and Parent Covenant

- We had our 1<sup>st</sup> service trip meeting with families in the fall, and we created a covenant with the parents.
- Fall Fest
  - WUSYG held its first big fundraiser on 11/3. This family-friendly event was well-attended and we raised over \$1500.
- Sleepover in Needham
  - Only a couple teens joined me for this sleepover with the Needham UU youth group where we also heard a presentation from a rep from an anti-human trafficking organization. It was interesting for those of us who went but ultimately I would not recommend we try to do this again.
- Holiday Pageant, Services Auction Fundraiser, & Mitten Tree Giftwrapping
  - We explicitly invited the teens to attend the Pageant this year as part of their “WUSYG” for the day, and also included larger speaking roles for them during the pageant, too. We held a services auction after the pageant, during the potluck, which we felt went very well. Our fundraiser was a big success and raised over \$3,000.
- Holiday Party
  - WUSYG had a big holiday part at the Richardson/Tompson house again on for current and former WUSYGers. We had a solid mix of both cohorts and had a fun time with a potluck, gift exchange, and some more intentional programming this year. It was great to catch up with so many of our college kids!
- Youth-led Service
  - WUSYG led the service on 1/26 with me doing the sermon. Attendance was 141, some of the highest for the year, and Rev. Heather noted that it was her favorite youth-led worship at WUS, ever!
- 8<sup>th</sup> graders invited on Feb. 23<sup>rd</sup> then Spaghetti Dinner on March 1<sup>st</sup>
  - We intentionally tried to have 8<sup>th</sup> graders join us for a couple things in a row but were not successful in getting any to come.
- Sleepover
  - We had a well-attended sleepover at Church on Feb. 28<sup>th</sup>, though we did have some confusion with teens coming and going, so, the takeaway was that we will want to have permission slips or otherwise a better way of accounting for their attendance and communication with parents during these events in the future.
- Youth Sunday
  - Our youth led this service via Zoom. We had 5 seniors providing statements: Charlotte Bradley, Evan Forcucci, Rachel Milt, Elizabeth Sharon and Elizabeth Tian. There was also a particularly large number of other teens contributing other parts to the service, too. Max Mackay, a sophomore, did all of the video editing, and

Elizabeth Tian provided artwork for title slides. John Kramer was particularly helpful as the video DJ on the day of the service, too. This year's Youth Sunday also included a Congregational Goodbye to Haley.

- We had 146 logins, and I counted over 40 additional people that I could see were also there. I suspect there were ultimately over 200 people in attendance, including several WUSYG alums.
- Although it was hard not to be together, some of the benefits of having this service in this way were being able to show slideshows of teens (and do fun video recreations of childhood pictures) and also making the service more accessible to relatives who live far away (for both our teens and for Haley and me).
- Our youth decided to give the Offering to Ferry Beach, which was where we did our climate justice-focused service trip last year (and which may shut down due to lack of income during COVID-19).
- June Fundraiser for the Congregation
  - Prior to COVID-19, due to the expected budget shortfall, YAC had agreed to share half of the money we raised during the chili cookoff.
  - Given the continued financial concerns, I offered to have WUSYG lead another fundraiser in June, virtually, for the WUS operating budget and local relief funds. If you are reading this before June 7<sup>th</sup>, please join us then after the service, for this special "Take Me Home" event featuring music and stories from our teens.
- Plans that did not happen because of COVID-19:
  - Parent Potluck
  - Chili Cookoff
  - The Service Trip (and all meetings for chaperones, parents, etc. about the trip)
  - Monthly brunches or other meetings with WUSYG Alums
  - Pride Parade
- Summer Programming
  - We are hoping to continue virtual programming with WUSYG over the summer, so as to provide some stability in teens' lives, give them something to do, and keep them connected socially over the summer. If at any point we feel we are able to meet in-person with specific parameters (for ex. only outside, with fewer than 10 people at a time, staying 6 feet apart, etc.) we may begin doing that as well.

## **Youth in Worship**

- We continued having youth lead the 1<sup>st</sup> reflection monthly, though we were unable to keep doing this during COVID-19. This continued to be a bit difficult sometimes to find takers, but generally went well and I would recommend we continue doing it as an important bridge between congregational ministries.
- Youth and I led the service in January and Youth Sunday. Both were 2 of the highest attended services all year.
- Youth participated in worship services as part of the adult choir, the Youth Choir and during some other musical performances.
- Youth had small roles in other services, including giving the teen version of the “precious life” 3-part sermon.

## **What’s Up WUSYGs**

- We brought back a few “What’s Up WUSYGs” this year, which are a time on a weeknight where we invite WUSYGers to hang out with Haley and me at a coffee shop and check in, ask questions about WUSYG, or otherwise talk about whatever is on their minds. Although these were generally lightly attended, they also always felt important and needed by those teens who did come.

## **Service Trip**

- We put a lot of effort into a trip that ultimately did not happen.
- Our Service Trip Subcommittee of YAC met during spring of 2019 to finalize our decision to return to West Virginia with Big Creek People in Action. This trip was approved by the Standing Committee in September.
- We had 27 teens registered to go on the trip, and recruited 5 chaperones in addition to our 2 staff: Roofus Hoffmann, Sally Degan, Sophia Sid, Gordy McIntosh and Chuck Khuen.
- We had an elaborate travel plan that included getting buses to/from Philly, spending a night at my home congregation in Philly on the way there and back, and renting minivans for our drive to/from Philly and WV.
- Between fundraising and other donations, we raised over \$6,000.
- After it was determined that we could no longer safely go on the service trip this year, we decided to send a donation of \$2000 to our partner organization in WV, that was comprised mostly of parents’ \$100 deposits, plus some of our youth’s fundraising (with all of their permissions).

## **Haley’s Departure**

This year was also marked by Haley’s decision that it was time to move on from this position, having served us in her role as Assistant Director of Youth Ministries for the past 5 years. She said goodbye to the congregation during Youth Sunday but plans to continue through the summer with our teens.

Here is the text that I sent out to the congregation to announce her departure, which effectively summarizes my feelings about this:

It is with a mix of emotions that I write to all of you with news that Haley has decided that this will be her last year with WUSYG. She joined us soon after finishing her undergraduate studies and has always been employed full-time while also working tirelessly to lovingly provide ministry to our teens for the past 5 years. At this point in her life she is considering furthering her education, making a different career move, or some combination of the two, and, doing so while also juggling all of the demands of being in this position understandably felt like it was too much.

Obviously, we are all heartbroken by this news as she has been a wonderful friend, co-leader, co-learner, shoulder to lean on, listener, educator and so much more to so many of us. Her ability to keenly understand the nuances of teens' identity formation, and carefully but seemingly-effortlessly guiding their moral compasses while creating a loving and accepting community for them to be themselves and experiment with what that means; her ability to be completely irreverent, hilarious and ridiculous when the moment called for it but also exude reverence and compassion when necessary; plus her incredible work ethic, excellent communication skills and multitasking abilities: all made her a uniquely qualified Assistant Director of Youth Ministries. I am so grateful to have been able to have had her for this long; it is not often you get to do work that you love so much alongside someone you love so much, too!

I am also proud of all of her accomplishments in this position and know that she is leaving us emboldened as a better youth educator, with a firmer understanding of the complexities of social justice issues and an increased commitment to our faith and its values. I am so very excited to see what she does with her incredible gifts and know that she will always remain in all of our hearts, with a lifetime membership to the larger WUSYG family and community.

### **Other DYM Duties**

- Ongoing/Monthly/Weekly:
  - o Met monthly before our YAC Meeting with our YAC chair.
  - o Met with YAC monthly.
  - o Weekly staff meetings and occasional worship planning meetings when relevant.
  - o Wrote or found 1st Reflection scripts and coordinated teens' involvement each month.
  - o Continued monthly meetings with Heather.
  - o Met regularly for supervision with Haley
  - o Continued to use our various Instagram, snapchat and Facebook accounts to post updates and keep in touch with our teens and their parents.

- Met with the Sanctuary Taskforce on a regular basis.
- Submitted a Wondering Wednesday approximately once a month.
- Wrote articles for half of the Mystic Messengers.
- Wrote and submitted reports to the Standing Committee monthly.
- Work with Alumni
  - In addition to finding various ways to connect with our alumni, this year I also provided pastoral care on a regular basis to some of our recent graduates. We were also planning to implement a new way for alums to gather in-person monthly, that I was very excited about, but did not get off the ground because of the virus. I very much hope that we can try to do this again in the future.
- Pastoral Care and Formal/Informal Recommendations for Youth
  - Provide pastoral support to youth and parents as needed throughout the year.
  - Continued to write numerous recommendation letters for teens, submit their names for various things, act as a reference for jobs, etc.
- Professional Development
  - UUA Youth Ministry Revival Training
  - LREDA Conference
  - UU College of Social Justice Program Leader Training
  - General Assembly
  - I would also consider my “Other UU Leadership” (see below), especially my weeks leading programs with youth for the UU College of Social Justice and also leading Youth Camp - and other UU youth events/weeks through organizations besides WUS – all very important learning and growth opportunities that are an integral part of my development as a professional religious educator.
- Other UU Leadership
  - Ferry Beach Youth Camp Counselor
  - Programming for the social justice track at a UU leadership school in the Pacific Northwest
  - UUCSJ Program Leader for an immigration justice journey to AZ for teens
  - UUCSJ Program Leader for a justice journey to WV with teens
  - Co-leader, UUCSJ Workshop on “Organizing Effective Justice Ministry Teams.”
  - Member of the LREDA Nominating Committee

With tremendous gratitude and love to this congregation for its continued commitment to multigenerational ministry and faith formation,  
Sam

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## Report of the Administrator Thomas Slack

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It is hard to believe I have already made it through my first church year as Administrator with the Winchester Unitarian Society. Some days it still feels like I just started. However, it has been an awesome year – in both good and bad ways. The first six months introduced me to so many great people as I learned the various aspects and systems related to my position. This learning was facilitated by interactions with several wonderful people who I will thank at the end of this report. There is a lot more to this role than I originally anticipated, and there is always something that needs to be done – so I am always keeping busy and learning new things.

The past few months have introduced some challenging times for all of us in the form of the coronavirus pandemic. This resulted in the need for adjustments to how I work and continue to provide support to the congregation. Although the transition to this new working environment was challenging – the great leadership of Rev. Heather and the support of my colleagues made it easier than it may have been otherwise.

Please accept the following report of projects I've worked on as my first Annual Report submission, and remember that these accomplishments are a combined effort by the administration/operation's team – myself, Jenny (administrative assistant), and the sextons (Joe, Mike B., Mike D.). I am very proud of this group of people and the daily contributions they make in service to the Winchester Unitarian Society.

### Office & Facilities Management

- **Ongoing Contributions.** The administration/operation's team works hard day in and day out to ensure that the building is clean and presentable for all congregants, staff members, and visitors who walk through these doors. This includes ordering of supplies utilized by all members and committees here at WUS. We also produce the Highlights newsletter and the Order of Service for each Sunday's worship service, along with the Mystic Messenger newsletter which comes out quarterly. All website updates; including Services, Calendar, Events, etc., are taken care of by the operation's team.
- **Committee Support.** Provided administrative support to various committees who may have needed letters and other documents printed and dispersed to congregants.
- **Vendor/Renter Relations.** Sometimes, communicating with outside organizations can be a big part of this position. Most of these are vendors who supply us with services to maintain

the building, but others are parties interested in using our space or public service organizations. You can see how WUS has interacted with various organizations this year.

- **Police Department.** We experienced an act of homophobic vandalism on the exterior wall by the nursery school playground area. Met with a few representatives from the Winchester Police Department, most notably Lt. Joseph Abdella, who gave us feedback on improving security for the building.
- **Elevator.** Due to my newness and initially unclear communication from the vendors, the elevator failed an inspection and had to be shut down. Coordination with the elevator company, our fire safety company and the State inspector's office, led to the remedy of the issues to get the elevator back up and running.
- **Plumbing & Drains.** There have been a number of sink, toilet, and drain issues around the building that required communicating with Loftus Plumbing and KP Drains to get them fixed.
- **Dishwasher.** The electric water heater stopped working. It required replacement of the blown heating elements, the contactor, and a rewiring of the transformer.
- **Snow Removal.** Unintended damage to the property due to snow removal was quickly repaired after we informed them of the incident.
- **Locks & Keys.** External doors were rekeyed resulting in the issuing of new church keys. There were only 40 created and the people with them are being tracked in our membership database, Breeze. PM Locksmith has also helped with rekeying two other doors within the building this year.
- **Rentals.** Prior to the coronavirus pandemic, there was a lot of rental activity. Network for Social Justice held two events with us in addition to their annual meeting. The Residences at Winchester had a number of meetings in the building. We had various piano recitals and an ongoing youth orchestra practice as well as four different AA groups, and a men's group.
- **Clocks.** The Clockfolks of New England repaired the grandfather clock in the Main Street foyer. They also expressed interest in purchasing the "minister's clock," a marble clock found at the back of the Sanctuary.
- **Fast Signs.** Fabricated and installed signs for the Main Street u-shaped driveway to make sure non-WUS people do not try to use the driveway as a parking area.
- **Continued Sexton Support.** Since the start of the coronavirus stay-at-home advisory the weekday sextons have continued coming to work. Mike B. and Joe have been cleaning areas that don't get as much attention during the regular church year, patching up areas of the church in need of some extra care and attention. Joe started painting the Sanctuary while Mike painted the back entrance by the Metcalf Kitchen as well as sanding and staining the exit door from Metcalf Hall to the parking lot.



- **Continued Connections.** Due to the pandemic keeping us from gathering together and sharing the same space we needed to incorporate new technologies into our daily routines. This came in the form of two Zoom accounts through the UUA for use by committees and groups in the congregations as well as a RemotePC account to allow me access to my work PC while at home two days of the week.

## Finance & HR

- **Bookkeeping and Payroll.** Jenny has switched gears this year and is now the primary person working on bookkeeping and payroll. She quickly learned to use the software and platforms needed to complete all sorts of tasks to include; tracking all incoming and outgoing payments, processing timesheets for all staff to ensure bi-weekly paychecks are issued, as well as maintaining accurate records of the pledging and giving of all congregants.
  - She is now training me (via Zoom) to do all of these tasks, so I can carry on this work while she is away for the summer.
- **Updated Job Descriptions.** In collaboration with the Personnel Committee, I reviewed a number of job descriptions and made suggestions to make sure what WUS has on file still matched the work being done by staff members.
- **Time Off Tracking.** Created a system to track the Vacation and Personal/Sick Time Off available to staff members.

## Communications & Outreach

- **Marketing System.** With assistance from the Music Committee, a marketing system was created to be used to advertise events to individuals outside the immediate congregation. This system was based on the methods used by the Music Committee to publicize for their Concert Series. Unfortunately, because of the pandemic, it has been difficult to take advantage of this at the moment.
- **Directory Updates.** The Member Directory has been updated a few times over this past church year. It seems even as I complete a new update, more changes need to be made, so going forward there will be a new updated Member Directory each quarter.
- **Pledge Drive 2020.** I worked (and continue to work) with the Pledge Team on this year's Pledge Drive by providing them with reports as new pledges come in. To date (5.25.2020), there have been 114 households pledged for a total amount pledged of \$347,565.

## Looking Forward

- **Summer Projects.** I have been developing my knowledge of Breeze, our membership database, and hope to spend a good amount of time over the summer further familiarizing myself to the many features it possesses and how they could be beneficial to the

congregation. I also will continue to develop the WUS Data Systems Schema, which is a project intended to map out and articulate the different systems and data elements used by program staff and committees throughout the WUS organization. I highly encourage committee members to utilize Google Shared Drives to keep track of all documentation created by committees for use by future committees and members of the congregation.

## Gratitude

I am extremely grateful for the warm welcome you all have provided me. I am glad to be providing support to such a wonderful community. I am thankful to all of you for the interactions we have shared over this past church year and I look forward to the interactions we will share in the future. A big thank you to Judy Murray and Sue Kiewra who helped me to settle in here at WUS. An equally big thank you to Rev. Heather and Jenny who have been tremendously helpful as I learned the ins and outs of this new job. Chuck Khuen and James Pidacks have taught me a lot about the building and I appreciate their ongoing support. Other folks who have helped me quite a bit this year are Kathy Richardson, Ryan Levering, and Tyson Kamikawa – thank you. It has been an honor and a privilege to see firsthand at staff and committee meetings the way this organization is managed and supported; most notably a thank you to members of the Standing Committee, Building & Grounds Committee, and Program Staff. Again, thank you to everyone for making me feel welcome. It is a pleasure to serve the Winchester Unitarian Society and its mission.

Please let me know if there is anything I can do better in support of the vision and mission of this great organization. Thank you.

Very respectfully,

Thomas R. Slack

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## Staff Covenant

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*As Winchester Unitarian Society staff, we covenant to bring care, integrity, collaboration, accountability and excellence to our relationships and our shared ministries:*

We do this by:

### Practicing basic civility

- We are patient with each other, recognizing the demands of our work at WUS and our lives outside the congregation.
- We respect each other:
  - We follow through on our commitments.
  - We arrive and conclude on time.

- We keep sensitive information about one another and our ministries in confidence.
- We honor different work styles, temperaments, modes of communication within the group and seek to accommodate one another.
- We are mindful of our potential impact on others through microaggressions and other disrespectful behaviors.

#### Seeking Collaboration

- We identify ways in which our ministry areas intersect and actively look for opportunities for partnership towards a spirit of unity in the congregation.
- We practice transparency, trusting each other by sharing information about our program areas.

#### Engaging in healthy communication

- We commit to being open to direct and honest conversations, even in times of difficulty or conflict.
- We give honest feedback, both praise and constructive criticism, so we may all best serve WUS's mission and the congregation.
- We speak of each other positively with those outside the staff team.
- If we seek a change in a colleague's behavior, we speak with them to address the issue.
- We avoid triangulation with each other and model this practice for others in the congregation.

#### Being mindful of accountability

- We recognize we are accountable to both the congregation and the world beyond it.
- We acknowledge we are responsible to one another, to the entire staff team and to members and leaders of the congregation, to the values of Unitarian Universalism and to the greater mission of the congregation, not just to those who supervise our work.
- Full-time staff intentionally represent the needs and perspectives of part-time staff in meetings and decision-making.
- We ask ourselves who is not "at the table" when making decisions.

#### Fostering a safe and dynamic culture

- We honor our personal vulnerabilities that emerge as part of our work together.
- We allow each other the "freedom to fail" to stimulate experimentation.
- We honor each other's "no" to embolden when we say "yes."
- We foster a culture of consent, checking in about how to engage one another.
- We strive to promote a collective ethic of shared agency, ministry and call.

*We all take responsibility in upholding and revisiting our covenant as needed.*

## **FINANCIAL REPORTS**

### **Report of the Co-Treasurers**

The year since the 2019 annual meeting has been a very busy one for your co-treasurers. Last summer after Alison Baron's departure and during Jenny Goh's vacation, WUS was without a church administrator or bookkeeper, so we took on the office routines of recording financial transactions in QuickBooks, paying and mailing bills, making bank deposits, making sure all our employees got paid on their regular schedule, maintaining payroll records, continuing work on the software transition from Church Windows to Breeze, and following up on pledges before the close of the fiscal year on August 31, 2019. Along with Rev. Heather, Kristine Kamikawa, and Chuck Khuen we were part of the search team responsible for finding a new administrator – screening and interviewing many candidates before unanimously and enthusiastically hiring Thomas Slack.

Training was next on the agenda – both for our new hire, Thomas, and for Jenny who bravely agreed to take on the new responsibilities of bookkeeper along with some of her traditional administrative responsibilities. We were fortunate to have such quick learners because there was (and still is) so very much to pass on! By the time our 3-year commitment to serving as WUS co-treasurers expires in May 2021, the next treasurer/co-treasurers will be in good hands with a skilled staff.

We continue to benefit from the 2018/19 software platform change from Church Windows to QuickBooks Online for financial management including all financial reporting and reconciliation of accounts. We should see similar benefits from the conversion from Church Windows to Breeze for online giving and tracking donations and membership information.

#### **Uncertain Times Ahead**

Along with the many people impacted in so many ways by the COVID-19 coronavirus, we are making budget/financial projections with insufficient information about the future. Usually by the time annual meeting comes around, with knowledge of our history and enough information about the current fiscal year, we are able to make estimates that we are quite comfortable with. Typically for the next fiscal year, our big areas of uncertainty are whether there will be an extra snowy and cold winter and whether the fundraiser will be successful.

Now, in addition to the usual uncertainties, we must face that none of us knows the financial impact COVID-19 will have on WUS finances. While we are dependent on income from pledges, the financial strains faced by some in our community may make meeting pledge commitments more difficult. Market declines will affect our endowment funds and lower interest rates will give us less income on the cash balances we strive to maintain. Rental income depends on our church facilities being open. Social distancing has forced the cancelation of our Town Day fundraiser, a major factor contributing to our shortfall in the current fiscal year. Will continued safety advisories prevent us from holding a traditional fundraiser like a Dine Around in the new fiscal year?

One potential bright spot is that we applied to the U.S. Small Business Administration (SBA) through the Payroll Protection Program (PPP) for a loan, which, if used per the mandate of the SBA to maintain our current staff and pay for utilities, could become a grant instead of a loan. This would help relieve some of the financial strain on WUS while helping us to maintain and support our staff. We submitted our PPP application through Needham Bank and were officially funded on May 5th. By the time we meet again in September we should have a much clearer picture of the impact of these monies.

So, for now, we are assuming that all pledges made for this year and next will be met and we are not yet including any \$ figure from a PPP loan. We hope that you will consider your Standing Committee's proposal for the 2020-2021 budget as preliminary, to be revisited in early September. While we may not have all the necessary information by fall, we will certainly know more than we do now.

## **Gratitudes**

Thank you to Jenny Goh for so capably and graciously stepping into the role of bookkeeper. Your strong work ethic, attention to detail, and friendly attitude have made this transition so smooth!

Thank you to Thomas Slack for signing on to work with us and for so quickly understanding us and helping in so many ways – so glad to have you on our team!

Thank you to Stacy Colella for her excellent work counting and recording our Sunday collections and helping to ensure our transition to Breeze has been as smooth as possible.

Thank you to the Trustees of Permanent Funds – Holly Clifford, Jennifer Dougherty, and Kathryn Maffei.

Thank you to the amazing pledge team of Alison Kirchgasser, Stephen Perepeluk and Robbie Brown.

Thank you to Patrick Draine for donation of his professional services to tune our pianos free of charge.

Thank you to Joan and Pete Baldwin whose generous contribution provided funds to fix the organ now and in the future, to provide special projects funding, and to provide an annual stream of income to the church operating budget.

Thank you to the organizers and supporters of our concert series.

Thank you to all our donors, pledgers, in-kind contributors, planned givers and all who share their gifts with our congregation.

Thank you to our minister, Rev. Heather, for your calm and gentle guidance and commitment to our community always, but especially as we navigate these more complicated times.

Thank you to the entire congregation for your valued input during an unusually difficult budget process.

Last, but certainly not least, a very special note of gratitude always to Kathy Richardson for her patience, caring, knowledge, and guidance in all areas.

## **On the following pages, we are providing:**

- a report for FY19 - September 1, 2018 through August 31, 2019 - of actuals versus budget
- a projection for FY20 - which began September 1, 2019 and will end on August 31, 2020 - of actuals versus budget. Projections are based on actuals through March 31<sup>st</sup> and our best estimates for the coming months
- the Standing Committee budget proposal for FY21 - September 1, 2020 - August 31, 2021 - approved by the Standing Committee at its meeting on April 15, 2020, for consideration by vote of membership at the 2020 Annual Meeting
- as accompaniment to these reports and proposed budget, a detailed spreadsheet of actuals versus budget for FY19, actuals versus budget for FY20 through March 31<sup>st</sup> with projections through August 31<sup>st</sup>, and the budget for FY21 as proposed by the Standing Committee
- a balance sheet report showing account and fund balances on 8/31/2018, 8/31/2019, and 3/31/2020
- a funds activity report from 8/31/2019 through 3/31/2020.

Respectfully submitted, Sue Kiewra and Judy Murray, Co-Treasurers

### **Report for FY19 (September 1, 2018 - August 31, 2019)**

Operations for fiscal year September 1, 2018 through August 31, 2019 closed with a net operating income of \$3,441 and net income of \$0 after adjustments to Capital Reserve accounts. Assets in checking and CD accounts at the Winchester Savings Bank and Needham Bank totaled \$377,361 on August 31<sup>st</sup>. We avoided the budgeted FY19 operating deficit of \$30,290 for good and bad reasons as follows:

#### **Income:**

- Contributions from individuals (current year pledge, prior year late pledge payments, non-pledge contributions, Share the Plate, and Sunday collection) were slightly under budget by \$1,065. Thank you to all whose generous fiscal support keeps our faith community strong.
- Investments exceeded budget by \$3,069 from CD interest and slight increases to Meyer and Cook trust disbursements.
- Rental income from the Winchester Cooperative Nursery School (WCNS) and the Chinese After-School program exceeded budget by \$4,000 because WCNS paid for use of additional space.
- The Winchester Town Day rummage sale went gang busters earning \$8,195 more than budgeted.

#### **Expenses:**

- Staff expenses were under budget by \$27,403 due mostly to Alison Baron's departure and Jenny Goh's summer leave, from RE not filling positions and from Rev. Heather Janules's contributing back the unused portion of professional expenses that are part of her total compensation package.
- Building & Grounds expenses exceeded budget by \$11,276 (or 15%) due to overages in utility costs – electricity, water/sewer, and gas heat. Repairs and adjustments to equipment were made to avoid similar overruns in FY20.
- Non-building operations expenses were under budget by \$1,022 with underspending in some individual budget lines and overages in others.
- Programs and committees underspent budget by \$5,892.
- Grants overseen by the Social Action and Outreach Committee via our Share the Plate offerings and commitment of a portion of operational expenses totaled \$36,734 or 5.5% of total expenses.

#### **Other Income and Expenses:**

As budgeted, monies were set aside for future expenses like sabbaticals and projects like audit/financial reviews. In addition, the Standing Committee approved the following motion at its meeting on Wednesday, October 16, 2019 resulting in a bottom line net income of \$0 for FY19.

#### **Motion:**

To close out WUS FY19 financial operations with adjustments to Capital Reserves funds on August 31, 2019, as follows:

1. Apply \$5,082.99 instead of the budgeted \$7,500 from the Sabbatical Escrow fund to cover the actual cost of the RE substitute during Rebecca Kelley-Morgan's sabbatical.
2. Apply \$8,194.51 from the overage on Fundraising income to the Fundraising Escrow fund.
3. Apply \$6,336.97 from the Stabilization fund to cover overages in utility expenses (heat, electricity, water/sewer).

#### **Resultant Changes to Capital Reserves on Balance Sheet:**

Capital Reserves	Aug 31, 2018	Before FY19 close-out vote	After motion was approved; effective 8/31/19
Undesignated	\$55,827	\$71,593	\$71,593
Project Escrow	7,350	9,350	10,350
Stabilization	7,865	10,000	3,663
Sabbatical Escrow	33,000	33,000	35,917
Fundraising Escrow	2,334	9,058	14,919
Building Carry-Forward	118	0	0
Total Reserves	\$106,494	\$133,001	\$136,442

**Projection for FY20 (September 1, 2019 - August 31, 2020) based on March 31, 2020 actuals**

A net operating loss of \$25,406 is projected for this fiscal year – \$16,618 greater than the budgeted deficit of \$8,788 which the congregation approved by vote at Annual Meeting in May 2019. Additional allocations were budgeted for Sabbatical Escrow (\$8,000) and Project Escrow (\$1,000). We will draw \$14,919 from Fundraising Escrow and \$19,487 from Undesignated Capital Reserves to cover the projected net operating loss and budgeted escrow allocations. Note that we are not including any \$ figure from a potential Payroll Protection Plan (PPP) loan since details are not available at this time.

**Income** – projecting \$39.1K less than budgeted

- We are currently projecting a shortfall in income from individuals of \$9.7K due to COVID-19-related declines in Sunday collections, Share the Plate contributions, and pledges.
- Income from investments is on track.
- The Nursery School has paid its total rent for the year while the Chinese After-School program still owes \$2.4K which we've projected will be paid. Prospects for additional income from building rentals are nil due to the COVID-19 building closure. \$4.5K less than budgeted for building use income is projected.
- Without the auction or Town Day event and with only \$56 from soap sales income (thank you, Rev. Heather), our \$25K budget goal for fundraising will not be realized. This is the major contributing factor to our projected net operating loss.
- The Music Committee has confirmed that the budgeted \$8K contribution to the general fund from the Concert Series will be made because of the overwhelming success of the first two concerts.

**Expenses** – projecting \$22.5 less than budgeted

- Staff compensation represents over 70% of church expenses. We saved \$1.2K in new administrator costs, \$4.8K by not filling the Faith in Action or RE Lead Teacher positions, \$3K in substitute musician and Sunday speaker costs. Total staff expenses are projected at \$9.1K below budget.
- Under Building & Grounds, we caught a lucky break with \$8.2K savings in snow removal costs. Hopefully utility expenses will see savings from closing the building due to COVID-19.
- Office operations are projected to be about \$500 under budget.
- We expect to spend \$2.7K less than budgeted in the area of program support since several committees have not utilized the funds they were allocated. Of particular note is Patrick Draine's generous donation of his professional services to tune the church's pianos free of charge.
- Because we've estimated that Share the Plate income is likely to be about \$2K less than budgeted, Share the Plate grants will be correspondingly less. Recall that whatever comes in for Share the Plate goes out to the intended grantee organizations. \$21.6K in Social Outreach Committee grants is still on track.

These variations from budget, \$39.1K less income and \$22.5 less in expenses, when added to the budgeted deficit of \$8.8K result in a projected net operating loss of \$25.4K for the fiscal year ending August 31, 2020. Add this to savings for future expenses: \$8K to Sabbatical Escrow and \$1K for Project Escrow (for a financial review). This will require us to tap \$34.4K from reserves: \$14.9K from Fundraising Escrow and \$19.5 from Undesignated Capital Reserves (our rainy day fund). The projected balances in capital reserve funds at the end of FY20 are indicated in the table below:

Capital Reserves	Aug 31, 2019	Projected for Aug 31, 2020
Undesignated	\$71,593	\$52,106
Project Escrow	10,350	11,350
Stabilization	3,663	3,663
Sabbatical Escrow	35,917	43,917
Fundraising Escrow	14,919	0
Building Carry-Forward	0	0
Total Reserves	\$136,442	\$111,036

## **Standing Committee Budget Proposal for FY21 (September 1, 2020 - August 31, 2021)**

Your Standing Committee (SC) has prepared a preliminary budget for FY21 which begins Sept 1, 2020, and runs through August 31, 2021. It was an iterative process involving the budget team, personnel committee, program staff, program committees, two congregational reviews, and final review and approval by the SC at its meeting on April 15<sup>th</sup>. It was quite a challenge to complete this work during the COVID-19 state of emergency and extra preparation was needed to ensure the success of meetings held via Zoom. We are grateful to those in the congregation who attended the budget preview meetings as your feedback enabled SC to make some hard decisions in formulating the budget for vote at Annual Meeting. It is the desire of SC that membership will approve this preliminary budget with the intention of revisiting it in September when the financial impact of the pandemic will be better known and revisions to the budget can be made accordingly.

Following this commentary is a spreadsheet with line numbers referenced in parentheses in this discussion. The right-hand column of the spreadsheet shows the details of the proposed FY21 budget up for vote during Annual Meeting.

### **Income –**

The pre-pandemic goal for pledges was \$400K. The pledge team estimated downward to \$360K (5) and they are still following up with folks who have not yet turned in their pledge cards. Note that 62% of WUS income (12) comes from individuals: pledges, non-pledge donations, share the plate income, and Sunday collections. When March 31<sup>st</sup> balances became available, our Trustees of Permanent Funds calculated disbursements (17-20) from restricted and unrestricted endowment funds and the new Baldwin Fund. We are grateful to past and present benefactors whose generosity provides 27% of WUS income (23) via disbursements from trusts and investments. Rents for the Nursery School (25) and Chinese After-School program (26) are going up by 5%. Hopefully income from other building rentals (28) will pick back up to their pre-coronavirus rates. Fundraising income is estimated for a Dine Around event (32). Income and sponsorships for our popular Concert Series are estimated at the same amount as this year (33). Total estimated income is \$655,726 (36).

### **Expenses –**

The standard steps SC followed to estimate expenses were:

- ensuring staff compensations were within guidelines for churches of similar size in the Boston metro area and follow MA state minimum wage laws
- applying the 2.2% cost of living adjustment (COLA) from January 2019 to January 2020 published by the Bureau of Labor Statistics
- estimating health, dental, life and LTD insurance increases
- reviewing building/grounds, office operations, and program committee costs based on the previous 3-years' averages
- paying our fair share dues to the UUA
- calculating social action committee and Share the Plate grants at 5% of budget.

Following these steps, the resultant first draft budget SC discussed had a deficit of over \$49K. We looked to Undesignated Capital Reserves to see if we could cover the gap and determined that we would be left with an alarmingly low balance of \$5K in reserves. What would happen if funds were needed in an emergency? It was deemed prudent to find ways to cut budget expenses. Recall the congregation's commitment not to make staff changes until the Visioning Team has examined programs serving ages Nursery through grade 12 with results due next November. Consider that some costs are not flexible, like building maintenance, utilities, liability insurance, office equipment and supplies, etc. SC proceeded to identify three expenses that could be "flexed": COLA, UUA dues, social action grants. Resultant savings:

- \$9,886 by freezing staff compensation at FY20 levels, no COLA
- \$2,734 by freezing UUA dues at FY20 levels breaking a tradition of over 25 years being "fair share"
- \$7,000 by calculating combined social action grants and share the plate grants at 4% of budget.



After laying out these options in the two congregational budget preview sessions hosted on Zoom and receiving feedback from about 30 individual in attendance, SC voted at their April 15<sup>th</sup> meeting to apply savings in all three “flex” areas of the FY21 draft budget which would leave a more comfortable \$24,648 in Undesignated Capital Reserves. SC also recommended that the budget should be reviewed in September and if conditions improved, funding in these areas would be restored.

The following is a summary of FY21 expenses and where savings are proposed:

- 74% of expenses (75) are for minister and staff compensation, benefits, retirement, insurance, and professional expenses. SC has proposed not applying 2.2% COLA in order to keep pay levels the same as for FY20. Hourly employee rates were checked for compliance with MA state minimum wage laws. A cap of \$35K (42) is set for the cost of substitute staff during Rev. Heather’s sabbatical which will be covered entirely by the Sabbatical Escrow Fund. There will be no student minister (43) since Rev. Heather will be on sabbatical and not available to supervise. The Faith in Action and RE Lead Teacher positions (57) were not funded. No additions were made to part-timers’ schedules. Minister and staff expenses (74) total \$531,155.
- 12% of expenses (82) are for building and grounds maintenance, snow removal, heat, electricity, water and sewer, and supplies. The estimate of \$85,000 (81) is based on the average of the last 3 year’s actuals which have been rising.
- 9% of expenses (90) are the operational costs of keeping our religious institution in business: insurance, office equipment, phones, internet, subscriptions, UUA dues, staff hiring expenses, etc. SC has proposed keeping our UUA dues level with FY20 (87). Operational expenses (89) total \$62,789.
- 2% of expenses (113) are for program committee expenses based either on the average of the last 3-years’ actuals or set in response to a committee request. Where the average was under \$100, we used \$100. When committees reconvene next fall to plan their activities, if they find their budget is too low, they are encouraged to work with their SC liaison to submit a request for SC to release additional funds from undesignated capital reserves. Total program committee expenses (112) are estimated at \$11,240.
- Combined Share the Plate grants and Social Action committee grants have been calculated at 4% (118) of budget as proposed by SC and total \$28,000 (117).

Total expenses for FY21 are estimated at \$718,184 (119). After applying \$35K (126) from the Sabbatical Escrow Fund, expenses are \$27,458 more than income. We propose to cover this gap using Undesignated Capital Reserves (123). The estimated balances in capital reserve funds at the end of FY21 are indicated in the table below:

Capital Reserves	Projected for Aug 31, 2020	Estimated Aug 31, 2021
Undesignated	\$52,106	\$24,648
Project Escrow	11,350	11,350
Stabilization	3,663	3,663
Sabbatical Escrow	43,917	8,917
Fundraising Escrow	0	0
Building Carry-Forward	0	0
Total Reserves	\$111,036	\$48,578

To reiterate, it is the desire of SC that membership will approve this preliminary budget with the intention of revisiting it in September when the financial impact of the pandemic will be better known and revisions to the budget can be made accordingly.

**FY19 Budget vs Actuals; FY20 Budget vs Actuals as of 3/31/20 with Projected Year-End; FY21 Proposed**

	FY19 Budget		FY20 Budget		FY20	FY21	
	Approved	FY19 Actual	Approved	FY20 Actual	Projected	Proposed	
	5/20/2018	8/31/2019	5/19/2019	3/31/20	Year-End	Budget	
<b>3 INCOME</b>							
<b>4 Individuals</b>							
5 Current Year Pledges	367,000	357,528	370,000	274,657	360,000	360,000	
6 Prior Year Pledges (Late Payments)	5,500	8,700	5,100	9,163	9,163	6,500	
7 Contributions - non-pledge	8,750	8,869	9,000	8,873	9,000	9,000	
8 Sunday Collection - non-pledge	10,500	12,960	11,500	8,484	9,500	13,000	
9 Sunday Collection - Share the Plate	13,000	15,412	15,000	11,739	13,000	15,000	
10 Electronic Funds Fees	(1,350)	(1,134)	(1,350)	(631)	(1,100)	(1,200)	
11	<b>TOTAL INDIVIDUALS</b>	<b>403,400</b>	<b>402,334</b>	<b>409,250</b>	<b>312,284</b>	<b>399,563</b>	<b>402,300</b>
12	<i>% of Total Income</i>	<i>61%</i>	<i>60%</i>	<i>60%</i>	<i>66%</i>	<i>62%</i>	<i>61%</i>
<b>13 Investments</b>							
14 Bank Interest	1,350	3,167	2,225	1,823	2,225	2,000	
15 Downs Income	12,340	12,340	12,340	9,255	12,340	12,340	
16 Meyer Income	60,100	60,705	57,673	33,600	57,600	57,600	
17 Trustees PermFunds - Unrestricted	90,844	90,844	95,833	48,000	95,833	96,567	
18 Trustees PermFunds - Building	750	794	794	802	802	716	
19 Trustees PermFunds - Cook Funds	7,500	8,103	8,103	8,190	8,190	7,310	
20 Trustees PermFunds - Baldwin Fund						2,373	
21 Trustees PermFunds - Student Minister	13,111	13,111	13,111	13,111	13,111		
22	<b>TOTAL INVESTMENTS</b>	<b>185,995</b>	<b>189,064</b>	<b>190,078</b>	<b>114,781</b>	<b>190,101</b>	<b>178,906</b>
23	<i>% of Total Income</i>	<i>28%</i>	<i>28%</i>	<i>28%</i>	<i>24%</i>	<i>29%</i>	<i>27%</i>
<b>24 Building Use</b>							
25 Winchester Coop Nursery School	25,000	28,000	29,400	29,400	29,400	30,870	
26 Chinese After-School Program	15,750	16,750	16,500	14,080	16,500	17,650	
27 Yoga	1,000						
28 Other Building Use	7,500	8,205	8,000	3,510	3,510	8,000	
29	<b>TOTAL BUILDING USE</b>	<b>49,250</b>	<b>52,955</b>	<b>53,900</b>	<b>46,990</b>	<b>49,410</b>	<b>56,520</b>
30	<i>% of Total Income</i>	<i>7%</i>	<i>8%</i>	<i>8%</i>	<i>10%</i>	<i>8%</i>	<i>9%</i>
<b>31 Other Sources</b>							
32 Fundraising	14,000	22,195	25,000	56	56	10,000	
33 Concert Series	8,800	8,000	8,000		8,000	8,000	
34	<b>TOTAL OTHER SOURCES</b>	<b>22,800</b>	<b>30,195</b>	<b>33,000</b>	<b>56</b>	<b>8,056</b>	<b>18,000</b>
35	<i>% of Total Income</i>	<i>3%</i>	<i>4%</i>	<i>5%</i>	<i>0%</i>	<i>1%</i>	<i>3%</i>
<b>36 TOTAL INCOME</b>	<b>\$661,445</b>	<b>\$674,548</b>	<b>\$686,228</b>	<b>\$474,110</b>	<b>\$647,129</b>	<b>\$655,726</b>	
<b>37</b>							
<b>38 EXPENSES</b>							
<b>39 Minister and Staff</b>							
40 Minister Wages and Benefits	128,406	128,406	131,385	75,940	131,385	131,433	
41 Minister Professional Expenses	9,960	8,413	10,210	4,666	10,210	10,200	
42 Substitute Staff during Sabbatical						35,000	
43 Student Minister, Summer Minister, Speakers	16,264	16,611	16,264	9,585	15,264	3,153	
44	<b>Total Ministerial</b>	<b>154,630</b>	<b>153,431</b>	<b>157,859</b>	<b>90,191</b>	<b>156,859</b>	<b>179,786</b>
45	<i>% of Total Minister and Staff</i>	<i>31%</i>	<i>32%</i>	<i>31%</i>	<i>32%</i>	<i>32%</i>	<i>34%</i>
46	<i>% of Total Expenses</i>	<i>22%</i>	<i>23%</i>	<i>23%</i>	<i>23%</i>	<i>23%</i>	<i>25%</i>
47 Administrator Wages and Benefits	64,937	53,294	62,765	34,225	61,536	68,593	
48 Administrator Professional Expenses	1,000	301	1,000	103	1,000	1,000	
49 Administrative Assistant Wages	19,797	18,712	20,285	15,118	20,285	21,702	
50 Sextons Wages	38,546	37,901	39,499	23,366	39,499	39,502	

	FY19 Budget		FY20 Budget		FY20	FY21		
	Approved 5/20/2018	FY19 Actual 8/31/2019	Approved 5/19/2019	FY20 Actual 3/31/20	Projected Year-End	Proposed Budget		
51	<b>Total Administration</b>		<b>124,280</b>	<b>110,207</b>	<b>123,549</b>	<b>72,812</b>	<b>122,321</b>	<b>130,797</b>
52	<b>% of Total Minister and Staff</b>		<b>25%</b>	<b>23%</b>	<b>24%</b>	<b>25%</b>	<b>25%</b>	<b>25%</b>
53	<b>% of Total Expenses</b>		<b>18%</b>	<b>16%</b>	<b>18%</b>	<b>19%</b>	<b>18%</b>	<b>18%</b>
54	DLRE Wages and Benefits	78,129	78,401	81,594	49,405	81,942	82,282	
55	DLRE Professional Expenses	4,500	4,168	4,500	26	4,500	4,500	
56	Substitute during Sabbatical	7,500	5,083					
57	RE Asst, Teachers, Faith in Action, Nursery	12,001	6,813	11,947	4,296	6,780	7,396	
58	<b>Total Religious Education</b>		<b>102,129</b>	<b>94,464</b>	<b>98,040</b>	<b>53,727</b>	<b>93,222</b>	<b>94,178</b>
59	<b>% of Total Minister and Staff</b>		<b>20%</b>	<b>20%</b>	<b>19%</b>	<b>19%</b>	<b>19%</b>	<b>18%</b>
60	<b>% of Total Expenses</b>		<b>15%</b>	<b>14%</b>	<b>14%</b>	<b>14%</b>	<b>14%</b>	<b>13%</b>
61	Youth Director Wages and Benefits	48,080	47,861	49,206	27,048	49,206	49,254	
62	Youth Director Professional Expenses	2,000	2,010	2,000	431	2,000	2,000	
63	Youth Assistant Wages	8,697	8,317	8,768	5,186	8,768	8,769	
64	<b>Total Youth</b>		<b>58,777</b>	<b>58,188</b>	<b>59,973</b>	<b>32,665</b>	<b>59,973</b>	<b>60,023</b>
65	<b>% of Total Minister and Staff</b>		<b>12%</b>	<b>12%</b>	<b>12%</b>	<b>11%</b>	<b>12%</b>	<b>11%</b>
66	<b>% of Total Expenses</b>		<b>8%</b>	<b>9%</b>	<b>9%</b>	<b>8%</b>	<b>9%</b>	<b>8%</b>
67	Music Director Wages and Benefits	44,653	44,602	45,769	26,375	45,769	45,769	
68	Music Director Professional Expenses	2,050	1,290	2,100		2,100	2,100	
69	Children's Chorale Director Wages	3,000	2,610	3,075	1,980	3,075	3,100	
70	Soloists, Section Leaders, Instrumentalists, Subs	15,650	12,975	15,150	8,080	13,150	15,401	
71	<b>Total Music</b>		<b>65,353</b>	<b>61,477</b>	<b>66,094</b>	<b>36,435</b>	<b>64,094</b>	<b>66,371</b>
72	<b>% of Total Minister and Staff</b>		<b>13%</b>	<b>13%</b>	<b>13%</b>	<b>13%</b>	<b>13%</b>	<b>12%</b>
73	<b>% of Total Expenses</b>		<b>9%</b>	<b>9%</b>	<b>10%</b>	<b>9%</b>	<b>10%</b>	<b>9%</b>
74	<b>TOTAL MINISTER AND STAFF</b>		<b>505,170</b>	<b>477,767</b>	<b>505,517</b>	<b>285,830</b>	<b>496,469</b>	<b>531,155</b>
75	<b>% of Total Expenses</b>		<b>73%</b>	<b>71%</b>	<b>73%</b>	<b>74%</b>	<b>74%</b>	<b>74%</b>
76	<b>Building &amp; Grounds</b>							
77	Snow Removal and Grounds Maintenance	16,000	14,909	16,000	6,869	7,800	17,600	
78	Building Maintenance	33,000	35,287	36,000	15,794	36,000	35,000	
79	Furnishings, Cleaning/Kitchen/Restroom Supplies	3,500	2,352	2,200	1,455	2,200	2,560	
80	Utilities - Heat, Electricity, Water/Sewer	23,300	34,528	25,500	19,094	25,500	29,840	
81	<b>TOTAL BUILDING &amp; GROUNDS</b>		<b>75,800</b>	<b>87,076</b>	<b>79,700</b>	<b>43,212</b>	<b>71,500</b>	<b>85,000</b>
82	<b>% of Total Expenses</b>		<b>11%</b>	<b>13%</b>	<b>11%</b>	<b>11%</b>	<b>11%</b>	<b>12%</b>
83	<b>Operations</b>							
84	Financial - Insurance, Pledge Drive expenses	16,600	15,536	15,850	8,094	15,600	15,850	
85	Office - Phone, Internet, Copier, Equipment, Postage, Website	16,100	17,227	18,000	10,401	18,000	17,800	
86	Staff Meetings, Acknowledgements, Transitions	2,150	1,116	1,500	1,089	1,290	1,300	
87	UUA Annual Program Fund (UUA dues)	24,853	24,853	27,339	20,504	27,339	27,339	
88	Partner Church, UU Urban Ministry membership	500	450	500		450	500	
89	<b>TOTAL OPERATIONS</b>		<b>60,203</b>	<b>59,182</b>	<b>63,189</b>	<b>40,088</b>	<b>62,679</b>	<b>62,789</b>
90	<b>% of Total Expenses</b>		<b>9%</b>	<b>9%</b>	<b>9%</b>	<b>10%</b>	<b>9%</b>	<b>9%</b>
91	<b>Programs &amp; Committees</b>							
92	Chime Playing and Maintenance	500	500	500		500	500	
93	Organ & Piano Maintenance	1,920	180	800			800	
94	Choral Music & Supplies	900	452	700	129	250	700	
95	RE Supplies & Curriculum	2,000	1,122	1,500	1,038	1,300	1,500	
96	OWL Teacher Training	400						
97	RE Special Programs	500		250	250	250	250	
98	Growth & Learning	500	170	100	(27)		100	
99	WUSYG Supplies & Projects	2,500	2,340	2,500	949	2,500	2,500	
100	Worship & Flowers & Candles	650	856	500	75	500	750	

	FY19 Budget		FY20 Budget		FY20	FY21	
	Approved 5/20/2018	FY19 Actual 8/31/2019	Approved 5/19/2019	FY20 Actual 3/31/20	Projected Year-End	Proposed Budget	
101	Fellowship	500	150	200	215	215	200
102	Hospitality	1,620	1,619	1,400	606	1,000	1,500
103	Membership	1,200	1,235	1,200	1,080	1,100	1,200
104	Grief Group & PCAs	850	208	400	113	150	200
105	Small Group Ministry	100		100			100
106	Leadership Development	300		100			100
107	Green Sanctuary	200	148	100	202	202	200
108	Social Action Supplies	100	20	100	(16)	100	100
109	Standing Committee	250	248	220			220
110	SC Projects & Initiatives	750	723	220	195	200	220
111	SFC - Planned Giving	500	378	100			100
112	<b>TOTAL PROGRAMS &amp; COMMITTEES</b>	<b>16,240</b>	<b>10,348</b>	<b>10,990</b>	<b>4,808</b>	<b>8,267</b>	<b>11,240</b>
113	<i>% of Total Expenses</i>	<i>2%</i>	<i>2%</i>	<i>2%</i>	<i>1%</i>	<i>1%</i>	<i>2%</i>
114	<b>Grants to Outside Organizations</b>						
115	Social Action Committee Grants	21,322	21,322	20,621		20,620	13,000
116	Share the Plate Grants	13,000	15,412	15,000	10,830	13,000	15,000
117	<b>TOTAL GRANTS TO OUTSIDE ORGANIZATIONS</b>	<b>34,322</b>	<b>36,734</b>	<b>35,621</b>	<b>10,830</b>	<b>33,620</b>	<b>28,000</b>
118	<i>% of Total Expenses</i>	<i>5%</i>	<i>5.5%</i>	<i>5%</i>	<i>3%</i>	<i>5%</i>	<i>4%</i>
119	<b>TOTAL EXPENSES</b>	<b>\$691,735</b>	<b>\$671,107</b>	<b>\$695,016</b>	<b>\$384,768</b>	<b>\$672,535</b>	<b>\$718,184</b>
120	<b>NET OPERATING INCOME (LOSS)</b>	<b>(\$30,290)</b>	<b>\$3,441</b>	<b>(\$8,788)</b>	<b>\$89,343</b>	<b>(\$25,406)</b>	<b>(\$62,458)</b>
121							
122	<b>OTHER INCOME</b>						
123	from Undesignated Capital Reserves	29,457		26,455		19,487	27,458
124	from Fundraising Escrow	2,333	2,333			14,919	
125	from Building Escrow		6,337				
126	from Sabbatical Escrow	7,500	5,083				35,000
127	<b>TOTAL OTHER INCOME</b>	<b>\$39,290</b>	<b>\$13,753</b>	<b>\$26,455</b>	<b>\$0</b>	<b>\$34,406</b>	<b>\$62,458</b>
128	<b>OTHER EXPENSES</b>						
129	to Fundraising Escrow		8,195	8,667		0	0
130	to Project Escrow	1,000	1,000	1,000		1,000	0
131	to Sabbatical Escrow	8,000	8,000	8,000		8,000	0
132	<b>TOTAL OTHER EXPENSES</b>	<b>\$9,000</b>	<b>\$17,195</b>	<b>\$17,667</b>	<b>\$0</b>	<b>\$9,000</b>	<b>\$0</b>
133	<b>NET OTHER INCOME</b>	<b>\$30,290</b>	<b>(\$3,441)</b>	<b>\$8,788</b>	<b>\$0</b>	<b>\$25,406</b>	<b>\$62,458</b>
134	<b>ADJUSTED OPERATING INCOME (LOSS)</b>	<b>\$0</b>	<b>(\$0)</b>	<b>\$0</b>	<b>\$89,343</b>	<b>(\$0)</b>	<b>\$0</b>

# Winchester Unitarian Society - Balance Sheet

	As of Mar 31, 2020	As of Aug 31, 2019	As of Aug 31, 2018
<b>ASSETS</b>			
<b>Current Assets</b>			
<b>Bank Accounts</b>			
1010 Winchester Savings Ops Checking	100,397.31	137,960.01	235,925.00
1020 Winchester Savings CDs	85,217.20	84,253.50	82,753.40
1030 Needham Bank CD 1	0.00	50,182.54	100,119.43
1040 Needham Bank CD 2	61,888.16	61,155.39	
1050 Winchester Savings MDF checking	4,837.31	3,809.54	
1060 Winchester Savings Money Market	120,126.30		
<b>Total Bank Accounts</b>	<b>\$ 372,466.28</b>	<b>\$ 337,360.98</b>	<b>\$ 418,797.83</b>
<b>Total Current Assets</b>	<b>\$ 372,466.28</b>	<b>\$ 337,360.98</b>	<b>\$ 418,797.83</b>
<b>TOTAL ASSETS</b>	<b>\$ 372,466.28</b>	<b>\$ 337,360.98</b>	<b>\$ 418,797.83</b>
<b>LIABILITIES AND EQUITY</b>			
<b>Liabilities</b>			
<b>Current Liabilities</b>			
<b>Other Current Liabilities</b>			
<b>3000 Operating Funds</b>			
<b>3020 Capital Reserves</b>			
3021 Undesignated Capital Reserves	71,592.78	71,592.78	55,827.08
3022 Project Escrow (Web, Marketing, Audit)	10,350.00	10,350.00	7,350.00
3023 Stabilization (Snow, Utilities, etc.)	3,663.03	3,663.03	7,864.77
3024 Sabbatical Escrow	35,917.01	35,917.01	33,000.00
3025 Fundraising Escrow	14,919.18	14,919.18	2,334.00
3026 Building Expense Carry-forward	0.00	0.00	118.28
<b>Total 3020 Capital Reserves</b>	<b>\$ 136,442.00</b>	<b>\$ 136,442.00</b>	<b>\$ 106,494.13</b>
3050 Prepaid Pledges	32,005.00	41,545.10	43,455.23
<b>Total 3000 Operating Funds</b>	<b>\$ 168,447.00</b>	<b>\$ 177,987.10</b>	<b>\$ 149,949.36</b>
<b>3100 Building and Grounds</b>			
3120 Michelson Room Redo	1,427.98	1,427.98	7,124.98
3130 Donald Ellis Fund	0.00	0.00	2,748.59
3140 from Stone Window Fund	845.39	845.39	845.39
3150 from Meditation Garden Fund	2,142.88	722.88	412.88
3160 Hardscape Upgrades Fund (Meyer)	7,282.57	17,327.28	60,000.00
<b>Total 3100 Building and Grounds</b>	<b>\$ 11,698.82</b>	<b>\$ 20,323.53</b>	<b>\$ 71,131.84</b>
<b>3200 Flower Funds</b>			
3210 Flower Fund	310.14	88.66	485.52
3220 from Dawn Kelley Bartlett Fund	1,437.62	1,465.29	10,998.98
<b>Total 3200 Flower Funds</b>	<b>\$ 1,747.76</b>	<b>\$ 1,553.95</b>	<b>\$ 11,484.50</b>
3300 Memorial Fund	700.00	2,500.00	10,624.83
<b>3400 Music Funds</b>			
3450 Concert Series	12,501.67	1,753.67	2,221.51
3460 from Parkhurst Organ Fund	0.00	393.18	2,843.63
3470 from Sue Swap Fund	3,284.00	1,568.31	757.72
3480 Elora Trump Fund	766.05	766.05	766.05
3490 Harpsichord Fund	536.00	536.00	536.00
3491 Cerny/Thomas Fund	873.53	2,336.41	2,772.02
<b>Total 3400 Music Funds</b>	<b>\$ 17,961.25</b>	<b>\$ 7,353.62</b>	<b>\$ 9,896.93</b>

	As of Mar 31, 2020	As of Aug 31, 2019	As of Aug 31, 2018
<b>3500 Outreach Funds</b>			
3510 Partner Church	2.00	600.00	663.00
3540 Reach Out	464.88	464.88	464.88
3550 Disaster Relief	50.34	50.34	50.34
3560 Woburn Council	20.00	20.00	20.00
3590 Outreach - other	0.00	0.00	255.16
<b>Total 3500 Outreach Funds</b>	<b>\$ 537.22</b>	<b>\$ 1,135.22</b>	<b>\$ 1,453.38</b>
<b>3600 RE Funds</b>			
3630 from Nash Nursery Fund	1,996.79	1,996.79	1,702.33
3640 Our Whole Lives - class balance	859.84	559.84	709.84
3650 Coming of Age & F8th in Action	466.07	466.07	-33.93
<b>Total 3600 RE Funds</b>	<b>\$ 3,322.70</b>	<b>\$ 3,022.70</b>	<b>\$ 2,378.24</b>
<b>3700 Youth Funds</b>			
3710 WUSYG Service Project Fund	15,903.29	7,277.79	3,836.33
3720 Church School Youth Fund	188.57	165.46	142.61
3730 from Sandy Fries Youth Fund	780.91	780.91	780.91
<b>Total 3700 Youth Funds</b>	<b>\$ 16,872.77</b>	<b>\$ 8,224.16</b>	<b>\$ 4,759.85</b>
<b>3800 Other Funds</b>			
3805 SC Projects Fund (Baldwins)	48,064.84	101,851.68	100,119.43
3810 Equal Exchange	-34.62	-34.62	-34.62
3820 Pastoral Care Ministry	934.85	934.85	934.85
3840 from Student Minister Fund	961.73	800.97	705.12
3850 Green Sanctuary Carbon Offset	500.00	500.00	
3870 Yoga Fund	1,230.33	420.33	369.08
3880 from Downs Fund	3,194.00	3,194.00	3,194.00
3890 Contra	1,869.44	3,505.90	5,250.66
3895 Minister Discretionary Fund	4,837.31	3,809.54	
<b>Total 3800 Other Funds</b>	<b>\$ 61,557.88</b>	<b>\$ 114,982.65</b>	<b>\$ 110,538.52</b>
3900 Uncleared WSB Checks in ChWindows	278.05	278.05	18,818.41
<b>Total Other Current Liabilities</b>	<b>\$ 283,123.45</b>	<b>\$ 337,360.98</b>	<b>\$ 391,035.86</b>
<b>Total Current Liabilities</b>	<b>\$ 283,123.45</b>	<b>\$ 337,360.98</b>	<b>\$ 391,035.86</b>
<b>Total Liabilities</b>	<b>\$ 283,123.45</b>	<b>\$ 337,360.98</b>	<b>\$ 391,035.86</b>
<b>Equity</b>			
Opening Balance Equity	0.00	0.00	0.00
Retained Earnings	0.00	0.00	0.00
Net Income	89,342.83		27,761.97
<b>Total Equity</b>	<b>\$ 89,342.83</b>	<b>\$ 0.00</b>	<b>\$ 27,761.97</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$ 372,466.28</b>	<b>\$ 337,360.98</b>	<b>\$ 418,797.83</b>

**Winchester Unitarian Society - Winchester MA**  
**Balance Sheet Funds Activity Report as of 03/31/2020**

Account Number and Name	Balance 8/31/2019	Receipts	Disbursements	Balance 3/31/2020
3021 Undesignated Capital Reserves	71,592.78			71,592.78
3022 Project Escrow	10,350.00			10,350.00
3023 Stabilization (Snow, Utilities)	3,663.03			3,663.03
3024 Sabbatical Escrow	35,917.01			35,917.01
3025 Fundraising Escrow	14,919.18			14,919.18
3026 Building Expense Carry-forward	0.00			0.00
3050 Prepaid Pledges	41,545.10	32,005.00	41,545.10	32,005.00
3080 from Downs Fund	3,194.00			3,194.00
3120 Michelson Room Redo	1,427.98			1,427.98
3140 from Stone Window Fund	845.39			845.39
3150 from Meditation Garden Fund	722.88	2,200.00	780.00	2,142.88
3160 Hardscape Upgrades Fund	17,327.28		10,044.71	7,282.57
3210 Flower Fund	88.66	1,008.47	786.99	310.14
3220 from Dawn Kelley Bartlett Fund	1,465.29	1,248.97	1,276.64	1,437.62
3300 Memorial Fund	2,500.00	700.00	2,500.00	700.00
3450 Concert Series	1,753.67	13,513.00	2,765.00	12,501.67
3460 from Parkhurst Organ Fund	393.18		393.18	0.00
3470 from Sue Swap Fund	1,568.31	2,965.69	1,250.00	3,284.00
3480 Elora Trump Fund	766.05			766.05
3490 Harpsichord Fund	536.00			536.00
3491 Cerny/Thomas Fund	2,336.41	736.20	2,199.08	873.53
3510 Partner Church	600.00	3,532.00	4,130.00	2.00
3540 Reach Out	464.88			464.88
3550 Disaster Relief	50.34			50.34
3560 Woburn Council	20.00			20.00
3630 from Nash Nursery Fund	1,996.79			1,996.79
3640 Our Whole Lives - class balance	559.84	300.00		859.84
3650 Coming of Age & F8th in Action	466.07			466.07
3710 WUSYG Service Project Fund	7,277.79	8,625.50		15,903.29
3720 Church School Youth Fund	165.46	23.11		188.57
3730 from Sandy Fries Youth Fund	780.91			780.91
3805 SC Projects Fund (Baldwins)	101,851.68	329.66	54,116.50	48,064.84
3810 Equal Exchange	(34.62)			(34.62)
3820 Pastoral Care Ministry	934.85			934.85
3840 Student Minister	800.97	13,271.76	13,111.00	961.73
3850 Green Sanctuary Carbon Offset	500.00			500.00
3870 Yoga Fund	420.33	1,260.00	450.00	1,230.33
3890 Contra	3,505.90	203,023.37	204,659.83	1,869.44
3895 Minister Discretionary Fund	3,809.54	2,997.92	1,970.15	4,837.31
<b>TOTAL</b>	<b>\$ 337,082.93</b>	<b>\$287,740.65</b>	<b>\$ 341,978.18</b>	<b>\$ 282,845.40</b>

**WUS Trustees' Annual Report**  
**for the**  
**Winchester Unitarian Society Permanent Funds**  
 March 31, 2019 - March 31, 2020

**ESG Mandate**

At the direction of the Congregation, the WUS Permanent Funds are invested exclusively in funds using ESG<sup>1</sup> factors in their investment selection process. As shown in the table below, the ESG benchmark performance of -4.42% outperformed the equivalent non-ESG benchmark performance of -5.37%. Most recently, we reviewed the portfolio's direct exposure specifically to fossil fuel investments which we are pleased to report is < 3.5%.

**Performance**

		<u>1-year*</u>
WUS Permanent Funds	Unrestricted	- 4.97 %
	Restricted	- 5.36 %
Blended Benchmarks	ESG	- 4.42 %
	Non-ESG	- 5.37 %

\* LPL Financial Advisory Performance Report dated March 31, 2020

Please see the last page of this Trustee's Report for the following Supplementary Information:

- A. Blended Benchmark Components: Allocations & Annualized Returns
- B. WUS Permanent Funds: Account Values
- C. WUS Unrestricted Account: Planned Distributions for the Church FY 2020-2021
- D. WUS Restricted Portfolio: Allocation to Each Restricted Fund

**Holdings**

Over the past year, the WUS portfolios have been invested in the following funds. This list does not constitute investment advice nor the solicitation to buy or sell any of these securities.

- I Shares MSCI USA ESG Select ETF
- Calvert Equity
- Parnassus Mid-Cap
- I Shares MSCI KLD 400 Social ETF
- Calvert Small Cap
- Pax MSCI International ESG Leaders Index
- Calvert Emerging Markets Equity
- Calvert International Opportunities
- TIAA-CREF Social Choice Bond
- Calvert Bond
- Calvert Short Duration Income

**Donations to the WUS Permanent Funds**

- **\$51,712 to the Restricted Funds**

The WUS is extremely grateful to our donors: Joan and Pete Baldwin, Walter Swap (donation will post in Trustees' FY21 annual report), Larry Banks, and the Music Committee (funding from the concert series).

- \$ 1,000 to The Larry Banks Intern Ministry Fund
- \$ 200 to The Sue Swap Fund, and
- \$ 50,512 to The Baldwin Fund, newly established this year

<sup>1</sup> Environmental, Social and Governance (**ESG**) investing is an umbrella term for seeking *both* positive investment returns as well as positive long-term impact on society, environment, and corporate governance.



- **\$32,500 to the Unrestricted Funds:** The WUS also gratefully acknowledges two bequests:
  - \$30,000 from the estate of Eleanor Dutoit and
  - \$ 2,500 from the estate of Dale L. Sherburne

Please contact any of the Trustees at any time with questions or if you wish to contribute to an existing WUS Fund or to start a new fund in honor of a special person or cause.

### **Disbursements from WUS Permanent Funds**

In total, **\$125,562** was distributed from all accounts comprising the WUS Permanent Funds during the Trustees' fiscal year ending March 31, 2020.

- **\$27,790 from the Restricted Funds:** Each of these Funds designates a special purpose as well as instructions for spending income only or both principal and income. Distributions are made at the beginning of the Church's fiscal year in September or October.
- **\$97,772 from the Unrestricted Funds:** These Funds support general operating expenses with four approximately equal distributions during the Church fiscal year. Distributions are based on:
  - The historical 3-year rolling average of the portfolio value as of 3/31 which is the end of the Trustees' fiscal year
  - A distribution rate considered consistent with the portfolios' long-term expected investment returns. Generally, the distribution rate has been 5%.

### **New Trustee**

We welcome Amy Hunter Maguire who joined the WUS Trustee team this year. Amy is one of the seven original executives of Boston Private Bank & Trust where she held many roles, including Director of Client Services for the Investment Management, Wealth Advisory and Trust area.

### **Great appreciation and heartfelt thanks to Shepherd Financial Partners**

The WUS and its Trustees are extremely fortunate to rely on the investment services and wise counsel of Mark Shepherd and his team at Shepherd Financial Partners. In particular, SFP has devoted considerable time and resources to support our ESG goals.

For many years now, Shepherd Financial Partners' services have been provided on a pro bono basis (where typical advisory fees are 1% per year). The WUS and the Trustees gratefully acknowledge SFP's generous gift of time, expertise, and care.

Respectfully submitted by Kathryn Maffei, Jennifer Dowling Dougherty, and Amy Hunter Maguire

**WUS Trustees' Annual Report – Supplementary Information**  
March 31, 2019 – March 31, 2020

**A. Blended Benchmark Components: Allocations & Annualized Returns**

ESG		Allocation %	Annualized Return
			1-Year
	MSCI USA ESG SELECT	45%	-5.75%
	MSCI USA Mid Cap Leaders Index	10%	-22.08%
	MSCO USA Small Cap ESG Leaders Index	5%	-25.97%
	MSCI EAFE ESG LEADERS	10%	-9.95%
	Barclay's Aggregate	30%	8.90%
<b>ESG Blended Benchmark Return:</b>			<b>-4.42%</b>
<b>Non-ESG</b>			
	S&P 500 (US large cap stocks)	45%	-7.00%
	S&P Mid Cap 400 (US mid cap stocks)	10%	-22.50%
	Russell 2000 (US small cap stocks)	5%	-24.00%
	MSCI NR EAFE (international stocks)	10%	-14.40%
	Barclays US Agg. Bond Index (US bonds)	30%	8.90%
<b>Non- ESG Blended Benchmark Return:</b>			<b>-5.37%</b>

**B. WUS Permanent Funds: Account Values**

Trustees' Fiscal Year March 31, 2019 - March 31, 2020

	Market Value 3/31/2019	Cash Flows during Fiscal Year		Market Value +/- Cash Flows 3/31/2019	Market Value 3/31/2020	Change in Portfolio Value		
		Donations	Distributions			Due to Cash Flows	Due to Market Activity	Total Change
<b>Unrestricted</b>	\$1,998,234	\$32,500	(\$97,772)	\$1,932,962	\$1,841,168	(\$65,272)	(\$91,794)	<b>(\$157,066)</b>
<b>Restricted</b>	\$630,422	\$51,712	(\$27,790)	\$654,344	\$614,863	\$23,922	(\$39,481)	<b>(\$15,559)</b>
<b>Total</b>	<b>\$2,628,656</b>	\$84,212	(\$125,562)	<b>\$2,587,306</b>	<b>\$2,456,031</b>	(\$41,350)	(\$131,275)	<b>(\$172,625)</b>

**C. WUS Unrestricted Account: Planned Distributions for Church Fiscal Year 2020-2021**

Calculation of Total Distribution						Timing & Dollar Amounts						
	Market Value as of March 31	Average MV for Most Recent 3 Years	Distribution Rate	=	Total to be Distributed							
						2020	2021					
						Dec	Mar	Jun	Aug			
2018	\$1,954,599	} <b>\$1,931,334</b>	x <b>5.0%</b>	=	<b>\$96,567</b>	\$24,000	\$24,000	\$24,000	\$24,567			
2019	\$1,998,234											
2020	\$1,841,168											

## D. WUS Restricted Portfolio: Allocation to Each Restricted Fund

Market Value  
3/31/2019  
**WUS Restricted Portfolio: All Funds 630,422**

End Value FY18-19  
& Start Value FY19-20

All Restricted Funds		
Fund Name	Terms Specified by the Donor	
	Source of Funds*	Distrib. Code**
Stanton	Inc	A
Pratt	Inc	A
Parkhurst Organ	Inc	A
Nash Nursery-1	Inc	A
Borden	Inc	A
Storer Mem	Inc	tbd-Intern
Spaulding Mem	Inc	tbd-i
Reinhardt	Inc	tbd-Intern
Sue Swap	Inc	A
Sandy Fries	Inc	tbd
Spencer	Inc	tbd-Intern
Trageser	Inc	tbd-i
G. Cook	Inc	A
Banks Intern	Inc	tbd-Intern
Nash Nursery-2	I&P	tbd
Cummings	I&P	A
Bartlett	I&P	A
D. Nash	I&P	A
H. Hall	I&P	A
C. and G. Cook	I&P	A
Caverly	I&P	A
Eustis	I&P	A
I Kelley	I&P	tbd
H. and F. Stone	I&P	tbd
Cerny-Thomases	I&P	A
Meditation Garden Maint. Fund	I&P	tbd
The Baldwin Fund	I&P	A

**TOTAL**

**630,422**

Cash Flows Fiscal Year 2019-2020		
Distributions	Donations	
	Rate	Calculated Distrib. \$
5%	-48	
5%	-23	
5%	-344	
0%	0	
5%	-205	
6%	-3,817	
6%	-2,933	
6%	-3,093	
5%	-2,466	200
0%	0	
6%	-2,642	
6%	-192	
5%	-4,898	
6%	-595	1,000
0%	0	
5%	-58	
5%	-1,249	
5%	-150	
5%	-193	
5%	-3,291	
5%	-53	
5%	-802	
0%	0	
0%	0	
5%	-736	
0%	0	
5%	0	50,512
n/a	-27,790	51,712

Calculating Each Fund's % of  
WUS Restricted Portfolio

Adjusted Allocated Value after adjusting for FY Distributions & Donations but before FY market activity	
\$ Value	% of Total
918	0.1%
439	0.1%
6,527	1.0%
5,658	0.9%
3,898	0.6%
59,806	9.1%
45,955	7.0%
48,450	7.4%
47,048	7.2%
5,316	0.8%
41,385	6.3%
3,004	0.5%
93,064	14.2%
10,323	1.6%
9,030	1.4%
1,110	0.2%
23,730	3.6%
2,858	0.4%
3,676	0.6%
62,538	9.6%
1,004	0.2%
15,243	2.3%
553	0.1%
84,651	12.9%
13,988	2.1%
13,659	2.1%
50,512	7.7%
<b>654,344</b>	<b>100%</b>

Market Value  
3/31/2020  
**614,863**

End Value FY19-20  
& Start Value FY20-21

Allocated Value  
of  
Each Fund  
3/31/2020  
(includes effects of  
market activity)

**\* Source of Funds for Distributions**

**Inc** = May distribute *only* income  
**I&P** = May distribute income & principal

**\*\* Distribution Code: Distribution Rate and Use of Funds**

tbd = to be determined upon request and per donor instructions; may be \$0 (e.g., no request)  
tbd-i = tbd & may be used for Intern Minister  
tbd-Intern = tbd and shall be used *only* for Intern Minister  
A = automatic 5%

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### Report to the UUA

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The Unitarian Universalist Association requires that member churches and fellowships certify membership in February of each year. The following numbers were reported:

	2020	2019	2018	2017	2016	2015
Signed Members	244	262	268	286	286	283
RE Enrollment	55	53	63	60	100	117
Pledging Units	136	145	146	142	145	147
Average Sunday Attendance	110	120	119	118	163	163

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## Report of the Standing Committee

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*From left to right: James Pidacks, Patty Cameron, Sue Kiewra, Mary McIntosh, Sheila Puffer, Fritzie Nace, Judy Murray, Betsy Bowles, Terry Currier – Missing from photo: Mikey Hyde, Patrick Draine, Robbie Brown*

As we began the 2019-2020 year for our Society, we had no way of knowing how our involvement or worship life would be required to change. The COVID-19 Virus pandemic altered life as we know it. Our congregation and your Standing Committee have remained active, strong, and resilient under the tireless work of Rev. Heather Janules. We are grateful for her.

In August 2019 we welcomed Thomas Slack as our new Office Administrator. Born in Winchester and raised in Woburn, Thomas served in the U.S. Air Force, graduated from UMass Lowell, loves reading, music, and nature. We have become quite reliant on him and he has become a great partner in our congregational life.

At Standing Committee's beginning retreat last fall, a review of the Bylaws, the formation of projects, and development of a Capital Campaign were set in motion. After much time,

research, and collective input, “7 Major Things” were identified as the most important items that need financial backing. This list and accompanying research are available for a future time when a campaign seems appropriate.

A well-deserved Sabbatical of rest and study for Reverend Janules was planned, agreed upon and approved by the Standing Committee. Martin Newhouse and the Committee on Shared Ministry (COSM) graciously agreed to collaborate with Reverend Janules and the Standing Committee to implement this phase of transition. COSM will also lead the effort on the search for a temporary minister. Unfortunately, due to the pandemic, at the time of this report, it is unclear if these initial plans will unfold.

The CORE analysis task force gathered data relative to the functions of the Society and examined how to best support these functions. It has included examining job descriptions, interviewing staff and comparing our structure to those of other congregations. At this time, CORE identified the area of children and youth programming as one requiring further study. Their report led the Standing Committee to create a charge to a newly formed Visioning Team. Their work and final recommendations will be presented to the Standing Committee in November of 2020.

Our attention shifted to church security after our building was vandalized and our flags were stolen multiple times. A story about the vandalism and our affirming policy was featured on the front page of The Winchester Star. On September 8<sup>th</sup>, we replaced our three flags (the American flag, the Rainbow flag and the Black Lives Matter flag) at our front door as physical symbols of our commitment affirming the worth, dignity and acceptance of all people. Additionally, the Winchester Police installed temporary security cameras. This led to a review of physical security and emergency preparedness. The Society conducted an all-building fire drill with the assistance of the Winchester Fire department after an October worship service and reported that all congregants managed to exit the building in just under 12 minutes. Building door locks have been changed and new keys distributed along with installation of a new keypad entry lock. A security grant was applied for and accepted by Commonwealth of Massachusetts resulting in a total of \$24,015 to be made available for additional security enhancements. This will include video surveillance, updated exterior lighting, video doorbells, and a remote release lock for the Main street door. Completion of this work is planned for the summer of 2020.

In March, our clerk and office administrator reported a revised, certified, current membership count to the Unitarian Universalist Association of 244 members. This was an enormous task of data verification, going back to our original membership book.

Due to the COVID-10 pandemic, our upcoming Spring Bazaar fundraiser was cancelled along with Winchester's early June 2020 Town Day.

The Legacy Circle initiative remains an open item on our website until a more appropriate time for its resurgence.

In March we were forced to close our beautiful building. The Centers for Disease Control restrictions on public gatherings during the COVID-19 state of emergency came into effect and with it, the cancellation of many society events and gatherings. Our lifeline became Sunday morning ZOOM on-line worship services and ZOOM committee meetings. Beginning March 15th, as many as 100 families began to log on and participate in shared worship. This continues to be inspiring.

As leaders have stated before, it is an honor to serve this liberal religious community. Hopefully, our commitment to our members and the countless people touched by our services, programs, and activism and financial support will continue for decades to come. The Standing Committee deeply appreciates the hard work and commitment of our members. Their work serves to continue our faith tradition.

Betsy Ellis Bowles and James Pidacks - Co-Chairs

Judy Murray and Sue Kiewra - Co-Treasurers

Mary McIntosh - Clerk

Robbie Brown, Patty Cameron, Terry Currier, Patrick Draine, Mike Hyde, Fritzie Nace, Sheila Puffer – Standing Committee Members

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### Report of the Building & Grounds Committee

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This year, the Building and Grounds Committee worked together with Church Administrator Thomas Slack on the planning, maintenance and operation for the Winchester Unitarian Society's physical plant and grounds. The Building and Grounds Committee's primary projects for 2019-2020 are listed below:

- **Re-paving and landscaping the rear parking area and Main Street entrance:** This summer we executed two plans created by our Grounds expert, Julie Khuen. The first regraded and paved a large portion of the rear parking area, solved the long-standing drainage problem, increased safety, and added four more parking spots...all without having to remove our fine, old Linden tree. The second plan upgraded the Main Street entrance focused on safety, aesthetics and the protection of our Centennial Oak. This included a new stone walkway, re-built granite steps and railings, repaved and edged drive, enhanced lighting,

and landscaping including irrigation for our beloved oak. We also restored the sitting bench and relocated it to the sidewalk so it may be shared by all. The completed work received rave reviews by congregants and passersby alike.

- **Replace section of main soil pipe:** Twice or more each year have had to 'roto-root' one or both of our root clogged soil pipes. Luckily the roots that were constraining both pipes were from our Centennial Oak which placed the clogged part of the pipes directly underneath the Main Street driveway scheduled to be repaved. Last summer we dug down 12 X 12-foot hole, replaced the appropriate sections of pipe and restored the base in advance of the repaving.
- **Accessibility, safety and aesthetics enhancements:** The repaving of the front drive was extended to include a new parking spot for mobility challenged people. In addition, low voltage lighting was added to illuminate the new parking area and walkways plus the exterior walls and interior of the cloister windows. This will greatly enhance safety and improve the church appearance at night.
- **Replace current bike rack with one or more modern units:** After the paving of the rear lot, we recycled the old, bent bike rack and added a new bike parking area with an attractive, up-to-date bike rack providing space for up to 5 bikes.
- **Prepared and submitted a comprehensive security enhancement proposal:** In response to a state RFP, James Pidacks, with help from Tyson Kamikawa and with input from security and law enforcement experts, developed a church wide security proposal. The state was offering funding in response to the recent occurrences of vandalism and attacks on places of worship. The proposal included a network of video security cameras plus selected enhancement to the primary and secondary access doors. The proposal was submitted at the end of January and we were awarded \$24,015, less than requested but enough to fund significant improvements to our security and access control. Plans are being re-worked to fit within this budget and these security upgrades will be completed this summer. (Thank you James Pidacks).
- **Other notable areas of maintenance:**
  - Replaced the frayed rope for the main bell in the bell tower
  - Replaced the ancient starter relay for the organ blower which was starting to chatter loudly
  - Added a solar powered, motion activated video camera to cover the front flags at night plus enhanced the flag poles to prevent bending/breaking in the wind.
  - Re-keyed all of the doors in the church, collected the old keys and set up a numbered key control system distributing the new keys to authorized users. Also



added a new keypad entry box to the back door to facilitate controlled access for authorized entry without a key. (Thank you James Pidacks!)

- Removed the space heater which ran at night to protect the sprinkler pipes in the maintenance room behind Winsor and replaced with thermostatic controlled heat tape which should deliver measurable savings on the electric bill
- Roto-root the blockage on the downspouts which were overflowing into the basement men's room during heavy rains
- Repaired the heating element for the Metcalf dishwasher and tested to assure compliance with health regulations
- Replaced four smoke alarms as part of the elevator system which could no longer be repaired
- Supported the SC in executing the first during a service, fire drill in some time – something that is planned to occur annually once we are back in session.

### **Potential Projects for 2020 – 2021**

Projects that the Building & Grounds Committee is considering include:

- **Implement the proposed security upgrades:** If the church is selected as a recipient of an award, we will implement the security upgrades to the doors and add the proposed camera system. If not, we will add communicating video doorbells to both the main front and back door entrances.
- **Test the rest of the outside gutter drainage system:** If any clogged, clean out all the way to their dry wells.
- **Replace the worn and stained carpet:** In the Windsor room.
- **Monitor town's proposed intersection safety changes:** Implement any small local repairs or improvements required after their work around our exterior sidewalks.
- **Clean out and re-do Music Room:** At the direction of John Kramer we will remove unused items and re-configure the Music Room at the front of the Sanctuary to add space and improve utility.

### **Issues and Projects Awaiting Funding**

- **Refinish the floors under the pews:** This is complex due to the need to remove, relocate and reinstall the pews to enable the refinishing.
- **Landscape and Upgrade the Mystic Valley Entrance:** The next area to be addressed for safety and appearance is the Mystic Valley side including walkways, lighting, landscaping and reconfiguration.

- **Restoring steam heat to the chapel:** The initial heating system for the chapel was disabled some time ago due to a failed blower. The chapel is being used more frequently now and the temporary heating augmentation fixes we had installed are showing themselves to be inadequate especially on cold days. Options for restoring the original steam heat are being considered.
- **Renovate Metcalf Hall:** Refurbish and upgrade our meeting hall to expand our ability to support large gatherings and the potential rental income that enables. If possible, this should include adding a close by accessible bathroom and replacing the dishwasher in the kitchen.

Respectfully submitted by the Building and Grounds Committee: Chuck Khuen (co-chair), Matthew Bronski (co-chair), Tyson Kamikawa, Joe Eiler, Julie Khuen, Sam Berliner, James Pidacks (SC liason), and Thomas Slack (Church Administrator)

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### Report of the Employee Relations Committee

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During church year 2019-2020, the Employee Relations Committee continued to carry out its responsibilities as set forth in Article 18 of the Society's by-laws. This involved face-to-face conferences with each staff member and with Reverend Heather. Our goal, as always, has been to hear and respond to any concerns that staff may have and to foster a positive work environment at the Society. Of necessity, nearly all our work requires that confidentiality be maintained.

Respectfully submitted,  
Sara Delano, Nancy Scott Newhouse, John Russell

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### Report of the Green Sanctuary Committee

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**Active members:** Maggie Russell, John Keller, Lindy Brown, Susan McPhee, Sheila Puffer, Fritzie Nace, Martina Werner, Sue Doubler, Shealagh Crowley, Cynthia Randall Phil Coonley (Chair), and Woody Wood.

Green Sanctuary's (GS) 2019-20 church year began with preparation for a WUS summer church service on "Environmental Responsibility" where the spiritual focus was Earth centered traditions and the call for action focused on **reversing global warming** by furthering those personal passions among the 80 identified in Drawdown as proven to combine social, economic, and green house gas (GHS) reducing benefits.

Our major fall activity was a presentation and 17 discussion groups in our Sanctuary on Drawdown: The Most Comprehensive Plan Ever Proposed to Reverse Global Warming. The event was planned and staffed with 25 representatives from our GS, MetroNorth Node of 350 Mass, Sustainable Winchester, CoolWinchester, and the First Congregational Church. (And James Pidacks huge help with AV set-up.) 70 area residents participated.

Our main behavioral campaign was continued promotion of how easy and important it is to purchase 100% 'green' electricity (Yea Susan and Sheila!), though only a few congregant households were added to the impressive list of 25 signed-up by last spring. This campaign was especially relevant given Winchester's 2019 summer/fall partnering with Arlington on a Heatsmart program (Yea Fritzie!) to diminish household use of fossil fuels by subsidized, efficient, and 100% green fueled heating/cooling, and solar hot water systems.

Another GS campaign focused on re-invigorating the church's recycling with new signage and receptacles (Yea Lindy and Maggie!), This prompted a January church service where "Reduce! Reuse! Recycle!" themes were incorporated in a church service featuring native American practices and beliefs respectful of the Earth and its interdependent creatures.

A Teracycle campaign with a recycling station in the Symmes Room (Yea Shealagh!) followed, as well as meeting with the First Congregational Church on creating a "Repair Cafe' in Winchester. Our "Repair Cafe" goal is for an initial town-wide opportunity this fall for free repairs of common household gadgets (e.g. lamps, small appliances, bicycles, etc., ) and skilled volunteer mending of favored clothing.

One late winter/early spring focus was preparation, with Rev. Heather's leadership, for the April 26 WUS Zoom (surprise!) service honoring the 50th anniversary of Earth Day.

GS also began exploring if the WUS could be responsive to Winchester's Climate Action Advisory Committee's (Yea Sue Doubler!) idea of listing key Winchester buildings as they become carbon neutral. We would first need a professional analysis of how to eventually get WUS off fossil fuels, or even to net zero Green House Gases. An Environmental Stewardship Assessment from Mass. Interfaith Light and Power (@\$895) is an option being explored with the Building Committee. We delayed earnest promotion of the GS initiated "Toward Zero WUS CO2 Emissions" account\*, an ideal source of funds for such a study, until the Pledge Drive was over. By then Covid 19 was causing havoc.

We are developing a list of discrete GS related tasks for summer completion, and will solicit volunteers via Highlights. Like Covid-19, denial and delay of actions to address environmental damage hurts us all. Join GS now.

**\*“Toward Zero WUS C02 Emissions” Account.**

Some WUS Congregants routinely buy commercial carbon offsets\* to neutralize the carbon dioxide (C02) added to the Earth’s atmosphere by discretionary air travel, or even of their household’s entire annual pollution. So the Green Sanctuary Committee initiated creation, with the WUS co-treasurers, of a WUSs budget **account** to which congregants may donate funds to offset pollution at a rate of \$20. per metric ton of C02. To calculate for air travel use: <https://calculator.carbonfootprint.com/calculator.aspx?tab=3> Check the box “Click to include radiative forcing”. ( Example 1, one person flying “economy” round trip from Boston to LA would produce 1.17 tons of C02, so the “offsetting” donation would be \$23.40.Example2, for two people flying round-trip in economy class from Boston to Lhasa via Beijing, China would generate 7.52 metric tons of C02, so the offsetting donation to “Toward Zero WUS C02 produce Emissions” would be \$150.40).

Funds donated to the “**Toward Zero WUS C02 Emissions**” account are restricted to: “ use in planning and implementation of steps leading toward a zero or negative church carbon footprint.” By October 1, 2019 the account’s balance was \$500. Donations are not encouraged from households with energy conservation or carbon fuels elimination opportunities still unrealized due to budget constraints, since these investments are especially cost effective given current subsidies. [www.masssave.com/rebates](http://www.masssave.com/rebates).

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**Report of the Membership Committee**

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**2019 - 2020 Membership Committee<sup>1</sup>: Chair** Marilyn Mullane (3rd); **Members:** Phil Coonley (3rd), Naomi DeLairre (2nd) and Gloria Legvold (2nd), Deb Eiler (1st) and Robin Wolf (1st); **Standing Committee Liaison** Patty Cameron

**19-20 Budget:** \$1,200 - We expect our expenses to fall within our allocated budget

**Goals:** Recruit 10 new members and attract 50 visitors

We were well on our way to attracting 50 visitors when Covid 19 intervened. To date, 40 visitors have graced our doors (38 in person and 2 from the virtual “visitor card” highlighted during our Zoom worship services). In terms of new members, we have 3 confirmed with a

<sup>1</sup> Rev. Heather is an active participant in all of our meetings and partner in all of our undertakings

possible 8 in the works. We hope to pursue these potential new members later this summer in time for the deferred fall Annual Meeting and New Member Sunday.

Like last year, we have worked diligently toward these goals by (1) creating social opportunities to reach out and engage both visitors as well as new and long time members, and (2) increasing exposure of our values and WUS events, both within and outside the church.

**Some of our new projects and endeavors include:**

- **Benchmarking** with Follen Community Church on growing congregation membership
- Furthering **partnership with the Fellowship Committee** and expanding intergenerational **Spaghetti Dinners** to celebrate (new the year) WUSYG on March 1 as well as RE on November 2
- Reviewing and cleaning up of **Church Directory**
- Advertising February 26th **League of Women Voters (LWV) Anniversary worship service** with Winchester Star and Winchester LWV chapter as well as active participation in the service itself (Note: many church members are also League members)
- Using our **visitor's list** to check in with each and to invite to new Virtual Sunday Church Services
- In March, the Pastoral Care Associates pulsed all congregants, via e-mail or phone, on their Covid 19 situation. In May, Membership followed up with **personalized handwritten notecards** to all with good wishes and an opportunity to connect through WUS online services and programs and/or by correspondence with the sender
- Lining up **ushers and greeters** for all live worship services

**Other activities and outreach:**

- September 21 Community Organization Winchester **Farmer's Market**
- September 22nd **Welcome Breakfast** for summer visitors, newer members and invited congregation
- Three **Bring A Friend** Sunday's - November 25th **Pie Sunday** (one of our most popular BAF), January 26th **Youth Led Service** (wonderful collaboration with Youth Director Sam Wilson and WUSYG), March 29th **Music Sunday** (deferred to next church year)
- New reusable, external **banners**, i.e. Music Sunday and Christmas Eve
- Re-established **relationship with new Winchester Star Editor**

- Replacement of **Welcome Cards** with added question for later analysis - What brought you here?
- **Quarterly Pew Event Card** advertising WUS programs and events
- Participation in a Rev. Heather led very successful one day **Reflection and Renewal Retreat** (replaced spreading classes over three separate gatherings) which involved 6 new or potential new members and 2 long time members
- Formation of **10 Circle Dinner** Groups with 76 adults participating (9 were first timers and 6 were couples who had not participated in recent years)

Our thanks to Rev. Heather, our close working companion; Staff for collaborating with us and following up with visitors; Worship Associates for encouraging newcomers to fill out a visitor's card as well as chatty congregants to take a red mug; Kristine Kamikawa for her beautiful banner design work; lead ushers Gordy McIntosh and Earle Boudreau for week in and week spearheading of our usher and greeter program; and all of you who ushered and greeted or made visitors and newer members feel especially welcome. Membership could not do our work without all of you. Membership's success is truly everyone's business.

**Proposed activities for 2020 - 2021 Church Year:** It is unclear whether when we will be able to return to our sanctuary for worship services. During our summer planning meeting, we will focus on how to recruit and engage members during this pandemic.

Respectfully submitted by the 2019 - 2020 WUS Membership Committee

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### Annual Report for Music

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Submitted by John Kramer on behalf of the Music Program and Music Committee.

It has been quite the year. Really, it feels like two years: pre-covid and covid, and it does make sense to break it into those two parts.

This past summer we again saw great success with musical participation in the services. We had excellent attendance for Summer Choir and many offered unique musical selections to worship. Special thanks go to June Edwards for filling in on hymns. It was also lovely having summer minister Joanna Lubkin provide some music as well.

I was able to attend two conferences relevant to my work here, the Association for Unitarian Universalist Music Ministries annual conference and the Massachusetts Choral Directors Association conference. Both offered great tips on repertoire and choral conducting and allowed me to connect with colleagues. There are a few of us in the Boston area who attend both conferences.

The program year was also very successful both with the musical presentation and participation. The adult choir added two new members, John Healey and Denise Konicek. Both are wonderful and welcome additions to our choir. The adult choir sang nearly every week in worship and presented *The Ballad of the Brown King* in December. The adult choir was preparing a special program celebrating Beethoven's 250<sup>th</sup> birth year, but that had to be cancelled. The adult choir had very consistent attendance from Sunday to Sunday, averaging about 25 singers.

The Children's Chorale likewise had a very successful year under the leadership of Kirsten Hart. Through her initiative and the generosity of the Cerny/Thomas fund, we were able to purchase a set of hand chimes as well as some other instruments for the Chorale. These have been extremely well received and the Chorale has grown significantly as a result. They had nine young singers participating in their February performance of *All You Need is Love*. Weekly attendance has also been very consistent. The Chorale performed monthly both on their own and with the adult choir at times. They also performed for the 4:00pm Christmas Eve service. We miss hearing them in worship and are also missing their end of year concert.

The Youth Choir had a strong year. We did lose a few members as schedules shifted, but had a very loyal four singers participating. The Youth Choir sang monthly in worship and was preparing for an outreach concert at the Gables when the pandemic cancelled all activity. We will need to do some targeted recruitment for this group next year.

The concert series had one its best years ever. We had three concerts planned; our last scheduled concert was cancelled due to the pandemic. Both our fall concert of Piano Quartets and our Jazz in the Sanctuary concert in January had some of the best attendance to date and our fundraising numbers signal that success. Windborne was unable to perform in May but we hope to hear from them in the future. I was able to put together a fundraising concert for May 16<sup>th</sup>. We project to have raised around \$10,500 net this year.

So, all in all this has been a great year for the music program.

Post Covid:

Our last live worship was March 8<sup>th</sup>. Since then we had two Zoom services from the Sanctuary and then we moved to completely remote Zoom services. It has been an interesting experience transitioning from live to virtual worship and I believe we have done a good job with all aspects. In order to maintain reliability of sound, I have been pre-recording most of the music for the services. Many of my colleagues have been staying with live music, but I have found the digital platforms can present sound unevenly, so have felt most confident about prerecording. This also enables us to have lyrics up for hymns and such. We have also been creative with visual montages for certain recorded portions.

I have been trying to keep people engaged with our “virtual choirs”. This is not equally accessible to all as some are better with technology than others. Some have considerably more experience. Take Tyson Kamikawa who produced an amazing video of his original arrangement of *Let it Be*. However, we have had about 10-15 singers contributing their voice on a weekly basis. It has been a pleasure to reconnect with some choir members who moved away like Chris Russian and Bob Cronon. And we are very excited to have Judy Lipperman joining us! I have also organized virtual sings for the Youth Choir and for the Youth service.

These do take a little bit of work to produce, both in getting a backing track prepared and then layering the vocal tracks that come in. The real difficulty is in lining up the sound so that everybody is as together as possible. One really misses the many subtle cues we rely on when making music together.

As I have settled into a routine with the production, the on-line work has gotten easier. And we may be at it for a while, so we can continue to refine this new art form. It is good to know that there are opportunities for greater connection even when we feel that connection overall is limited. I would just amplify that some members who have geographically relocated still feel very connected to WUS and through the on-line platform they have been able to be a part of our community once again. It is also wonderful to have new singers joining our digital efforts.

It is hard to tell when we will be able to have the music program in full swing. I am reminded that singing is essentially like coughing in terms of transmission of “droplets”. So it is unlikely that we will be able to have the choir assemble, even if we were six feet apart. Hymn singing in a closed space also feels like a dangerous proposition. And, many of our members are older, which puts them in a higher risk category. We will try to prepare for the future as best we can and stay open and flexible as needed.

John Kramer, Music Director



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## Report of the Pastoral Care Ministries

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The Pastoral Care Ministries envision a WUS community that is sustained, individually and collectively, by spiritual, emotional and practical support from ministers, staff, and members. An underlying value is the belief that pastoral care is a shared ministry.

The following groups fall under the Pastoral Care Ministries umbrella:

**The Pastoral Care Associates (PCAs)**, under the direction of Reverend Heather Janules, provide care and visits to those in our congregation who are ill, unable to attend church regularly, or simply appreciate a visit. The PCAs also often deliver Sunday flowers as part of their multi-dimensional ministry. The PCAs meet monthly, along with the Ministerial staff, observe strict rules of confidentiality, and build their skills and knowledge through ongoing training. Early in the past year, Lee Barton, Carol Delaney, and Kim Foley joined the PCA group, while Steve Butterfield resigned following relocation in Vermont, and Carole Nassif shifted to PCR after several years of devoted service as a PCA. Ongoing PCAs are Dennis Brett, Vicky Coccoluto, Barbara Keyes and Donna Reed.

The “social distancing” conditions of the COVID-19 pandemic have precluded in-person meetings and congregant visits since mid-March of 2020. However, the group has continued regular connection via Zoom online discussions and maintained telephone contacts with congregants receiving pastoral care.

Wintertime workshops on “Creating A Spiritual Legacy” were led by Intern Minister Marianne DiBlasi with PCA support. More recently, under the guidance of Rebecca Kelly-Morgan, “End-of-Life” workshops designed to assist members considering important decisions with regard to advance directives were scheduled for the spring. This program will be condensed and presented in an online format now planned for Saturday, June 6. PCA member Carol Delaney has been recently designated as a Community Chaplain, a newly-created role affirmed by the Standing Committee. She will be available for situations where her professional skills would be especially helpful to the Pastoral Care Ministries.

**Pastoral Care Resources (PCRs)** have served previously as PCAs and are available to participate as needed in the various Pastoral Care Ministries. Current PCRs are Sara Delano, Karen Erikson, Carole Nassif, Maggie Russell, and Maria Shepherd. The PCRs have been active in many of the outreach efforts of the PCAs in the past year.

The PCAs and PCR's participated extensively in the March-April "Needs and Resources" telephone survey of WUS members, establishing baseline data on ways that congregational life has been affected by the threat of COVID-19, as well as offers of assistance from the congregation.

**Meals and Rides** (previously Caring Network) volunteers are coordinated by Gay Mohrbacher, who works closely with the PCAs. Volunteers provide practical support, such as meals and occasional rides and errands, which can be short-term, or extended in times of lengthy need. Since the start of the new Church year in September 2019, a half-dozen members have been served by volunteers delivering approximately 5 meals, but providing myriad rides and performing numerous chores. Volunteer roles such as these are a good way to introduce newcomers into the WUS community and to welcome their contribution to its ministry.

**Mental Health Awareness and Support Initiative (MHASI)** is a PCA initiative which cultivates awareness and support for those who experience mental illnesses. Monthly meetings of this group during the past year have been co-facilitated by Maria Shepherd and Isobel Magee.

**Memorial Service & Reception Team**, under the leadership of Sara Delano, Karen Erikson, and Vicky Coccoluto, works closely with the PCAs and Rev. Heather and provides support and practical guidance for families holding memorial services and receptions. Since the last annual report, a memorial was held for Michael Costa in early February. Further memorial services are on hold, notwithstanding two April deaths in the congregation, until the restrictions affecting public gatherings are lifted.

After a long run of monthly meetings, "the grief group" went on hiatus this year due to low participation. Pastoral care leaders are open to beginning the group again, in the same or altered format, should the need arise. We thank group founder, Karen Erikson, for her years of exemplary leadership; and Lee Barton and John Loewy for their service as co-facilitators.

Submitted by Vicky Coccoluto on behalf of the Pastoral Care Ministries

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## Report of the Personnel Committee

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From the charge to the Personnel Committee:

The Personnel Committee shall serve as an advisor to the Standing Committee to assist with matters related to employee compensation, benefits, personnel policies, and employee contracts for all WUS employees except the ministers.

As in many areas of church life, situations created by the coronavirus state of emergency have dominated the concerns of the Personnel Committee this spring. We have made recommendations to the Standing Committee about compensation and equipment for those who must work from home. With invaluable assistance from the Unitarian Universalist Association, we are following the development of Federal programs, in particular the Families First Coronavirus Response Act, which provides emergency paid sick leave as well as emergency family and medical leave.

Through the year we continued the project to assure that job descriptions reflect current practice and that they conform to a standard format. We finalized descriptions for the Coordinator of Administration & Communication, Office Assistant, Bookkeeper, Music Director, Director of Youth Ministries, Child Care Provider, Religious Education Assistant and Sextons. We audited the office files to assure that there are paper copies as well as computer copies of job descriptions and letters of agreement for all positions.

This year the UUA expanded its compensation guidelines to include checklists to help churches adhere to legal requirements concerning employment and benefits administration. We reviewed our procedures to assure compliance and recommended changes as needed. Additionally, the UUA updated its model Personnel Policy Manual, and we are reviewing that as we work on a major revision of our manual, which was adopted in 2018.

A discussion about providing computers for staff evolved into consideration of issues of privacy, security and the ownership of intellectual property. We are working with Thomas Slack, the Coordinator of Administration & Communication, to clarify procedures for the safe and orderly maintenance not only of data utilized by staff but also that generated by committees.

We are also working with Thomas as he develops procedures for tracking paid time off earned and taken.

In addition to those mentioned above, we would like to thank staff for their thoughtful input into proposed changes.

Respectfully submitted,  
Pete Baldwin, Sue Kiewra and Kathy Richardson  
with Rev. Heather Janules

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### Report of the Religious Education Committee

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This 2019-2020 church year the Religious Education (RE) Committee members were Lucille Cannava, Karen Caputo, Erin Graham (co-chair), Ryan Levering, Naomi Magnoni (co-chair), and Mike Hyde as the Standing Committee representative. The RE Committee was short one member this year. Rebecca Kelley Morgan was the Director of Lifespan Religious Education. Many thanks to Rebecca for all her work and insight.

In June 2019 the RE Committee held a retreat to plan for the 2019-2020 church year. At the meeting, feedback was received from the teen teachers as well as Terry Currier, who had filled in 2018-2019 while Rebecca was on sabbatical. Lessons learned were considered as well as articles and materials from the UUA. The RE Committee along with Rebecca and Rev. Heather then planned for this 2019-2020 church year including setting the age grouping and theme for Sunday RE classes, as well as discussing potential family ministry type offerings.

The focus this church year was to:

- Support children in their faith formation and provide and plan for experiences and exposures to enable them to do so.
- Continue with a curriculum-based model on Sunday mornings.
- Engage in family ministry by supporting parents and providing opportunities outside of Sunday mornings for children's faith formation and parent support in their children's faith formation.
- Support the staff and volunteers from the congregation working with OWL & F8th in Action and come up with strategies to increase or at least maintain participation
- Continue to engage and connect with other WUS committees and members of the congregation to provide for intergenerational experiences
- Set priorities as the religious education part of the WUS budget needs to be re-evaluated (the RE Committee held two special committee-only meetings in December and January)

- Discuss ways to stay connected and support families once the COVID-19 emergency started in the spring

Rev. Heather continued to attend the monthly RE meetings and provided invaluable insight and input (and note taking!). She also received feedback about the intergenerational worship services.

Rebecca returned from her sabbatical. Again this church year the Lead Sunday RE Teacher position was not filled. Because of that, Rebecca served in that capacity on Sunday mornings rather than consistently leading Family Worship as in past years.

This church year the RE Committee was responsible for finding a member of the congregation to deliver the Family Worship message the first Sunday of each month. A few more seasoned congregants led the whole Family Worship service. Those recruited by the RE Committee were: Naomi Magnoni, Matthew Bronski, Deb Walsh, Mary McIntosh, Fritzie Nace, Vicki Coccoluto, and Margaret Lowry. Margaret was scheduled for the first Sunday in April, but was cancelled because of the COVID-19 emergency. Many thanks to them for volunteering, providing the messages, and connecting with the younger congregants.

The RE Committee was also responsible for scheduling the youth chalice kindlers for the 10:30 worship service. Thanks to RE Committee members Lucille Cavanna and Naomi Magnoni who performed this task.

The curriculum model for Sunday morning was continued based on feedback from parents and others in the congregation two years ago (spring 2018) at special congregational meetings. The RE program needs even more branding/identity across all ages to build excitement both with the children and parents about the programming. Generally, Rebecca modifies and crafts curriculum during each week and then works with the teen teachers at 10:00 before worship to orient them to the new/modified lesson plan and materials for that Sunday's class. RE Assistant Evan Forcucci was instrumental in making logistics run smoothly on Sunday mornings.

Overall attendance was low this year, but consistent among a handful of dedicated families.

#### Summary of RE Committee Program Offerings 2019-2020:

##### *Nursery (Sunday morning)*

Juanita Simms led a fun and warm environment for babies and toddlers. The need for this remains consistent and there are several regulars who look forward to seeing Juanita every week.

*Pre-K - 1st grade: World of Wonder (Sunday morning)*

This program focuses on the 7th principle of UUism: “respect for the interdependent web of all existence” and included nature based curriculum and activities. Teen teachers Isabelle Kamikawa and Caroline O’Callaghan led.

*2nd - 4th grade: Moral Tales (Sunday morning)*

Using stories as a primary means of conveying wisdom, what it means to “be a good person” through values of Unitarian Universalism was explored.

Teen teachers Charlotte Bradley and Elizabeth Sharon led.

*5th - 6th grade: Faith Finders (Sunday morning)*

Faith Finders was new this year as it was determined at the June 2019 retreat that the former “Neighboring Faiths” curriculum was lacking, and last year scheduling visits to other faith traditions proved too challenging. Faith Finders was intended to be based on a F8th-In-Action type model, but with activities promoting service and leadership within the WUS community for a younger cohort. Rebecca led the small group that attended (mostly 2-3 children).

*7th grade: OWL (Sunday afternoons)*

This comprehensive sexuality education program offers clear and factual information and provides many opportunities for values reflection, values clarification, and peer dialogue. As always, the RE Committee is thankful for the amazing OWL volunteers: Sioux Brokaw, Karen Caputo, Ryan Levering, and Jenny Nordan, who taught this sensitive subject this year. The course had to stop with five sessions left as the nature of this course does not allow for the social distancing required by COVID-19. Rebecca is coordinating a way to provide closure for the course.

*8th grade: F8th in Action (Sunday afternoons)*

The program started with six participants but quickly dwindled which challenged the program the rest of the year. Initially three adults, one being Thomas Slack, another adult, plus Rebecca were scheduled to lead this group, but the dynamic was awkward with the adult to student ratio. It is important to have a critical mass with this age group. There were attempts to combine some activities with WUSYG, but these weren’t as successful as hoped. The program completely stopped with the COVID-19 emergency in March. The RE Committee will be looking for ways to rebrand and re-energize programming for this age group.

*Potluck Theology (Sunday afternoons)*

The RE Committee will have hosted five Potluck Theologies by the end of the year. They have been intended as a way to teach families together about different faith values as well as an

opportunity to share a potluck meal together and continue the camaraderie within the WUS community.

- October 27 Diwali: Swati and Suman Mukherjee led a wonderful program that explored Diwali and which included Rangoli, Henna designs, incense, slides, and Indian sweets
- December 8th Festivals of Lights: Rebecca led a message about festivals of lights (Advent, Kwanza, St. Lucia, Channukah, Solstice)
- Jan 26th Refugee- Rebecca read a children’s book about refugees
- March 29th Easter egg dying- Rebecca led a message about Easter and Jesus Christ. Despite being virtual, it was a surprising success. Families dyed eggs at their own homes while listening to the message and occasionally checking in with one another.
- May 31 (scheduled) - Virtual picnic with card making

#### *JanFest (Sunday mornings in January)*

WUS children look forward to JanFest every year. They consider it a highlight of the RE church year. This year was no different, and thanks to the volunteers and staff who again made it a success: Sean Crowley, Tyson Kamikawa, Kirsten Hart, Steve Forcucci, Charles Wright, Sue Kiewra, and Green Sanctuary members Phil Coonley, Fritzie Nace, Erin Graham.

#### *Additional coordination with the Green Sanctuary Committee, Worship, and the Intern Minister*

In addition to having Green Sanctuary committee members participate in JanFest offerings, thanks to Green Sanctuary members Lindy Brown and Maggie Russell for leading a special RE Sunday morning class on March 8th about the new recycling rules. After consultation with the RE Committee, Rebecca, and the sextons, Lindy and Maggie developed a lesson plan, activities, and outreach materials to teach the children about the new (and puzzling) state-wide rules. The children collected and sorted recyclables throughout the church building. Outreach materials were provided so that the children could then teach their parents.

The RE Committee also helped with the December holiday pageant and coordinated with Marianne DiBlasi, the intern minister, regarding an event for the social justice book “Refugee” by Alan Gratz for children ages 9 and older held at the Winchester Public Library.

#### *Supporting Parents*

“Let’s Be Honest” Planned Parenthood Workshop November 17th- The RE Committee sponsored a Planned Parenthood interactive workshop run by parent educator Ran Courant Morgan, who shared resources and information and empowered parents in their role as the primary sexuality educators of their children.

Parents Night Out February 15th: During the WUSYG auction fundraiser, the RE Committee bid on and successfully procured the WUSYG babysitting service item. WUSYGers did a wonderful job providing care, feeding, and engaging the children in fun activities at the church while parents were able to enjoy a “date night.”

### Administrative Tasks

Some administrative changes and successes this year included the use of the shared drive for RE Committee documents and resources, which helped with coordination and will help future RE Committees. A targeted email list was developed for the parents of children. In addition, the RE Committee asked Rebecca to send out a “look at the month ahead” email to parents so they could see what was to be offered in Sunday RE classes and schedule for that month’s upcoming activities.

### Looking Forward

With the COVID-19 emergency still on-going and Rebecca’s resignation that will happen next year, there are many questions about what the RE program will look like in 2020-2021 and the coming years. Despite the uncertainty, the RE Committee is very engaged in setting overall goals and details of the programming. We’re looking forward to an end-of-year retreat to plan for next year and to brainstorm ideas to continue to make the RE program more enticing for children and more helpful for parents. The Staffing & Operations Analysis Group (CORE Group) asked for RE Committee input regarding the priorities for the RE program and the RE Committee held two special meetings in December and January to develop these. A Visioning Group separate from the RE Committee and CORE group, but with RE Committee representation and RE Committee input via the priorities set at the December 11th and January 15th RE Committee special meetings, has been created to look at all WUS children’s programming (through high school) and evaluate options within the challenging WUS fiscal restraints.

Respectively submitted by co-chairs Erin Graham and Naomi Magnoni

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## Report of the Sanctuary Task Force

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**Sanctuary Task Force Members:** Patty Cameron, Rev. Heather Janules, Marilyn Mullane, Mayra Rodriguez-Howard and Sam Wilson

On March 20, 2020, we learned that the First Parish of Bedford’s Strategic Team decided to temporarily stop all volunteer shifts during Covid 19 after the Town of Bedford’s Board of



Health declared a state of emergency prohibiting service and activities at various establishments in town, including houses of worship. Given Maria's decision to remain in sanctuary with now her two sons (since schools are closed) and her mother, First Parish continues to support Maria and her family physically, financially and emotionally. So, what did the Winchester Unitarian Society do to help?

First, we sponsored a virtual Share the Plate on Easter Sunday for the First Parish of Bedford's Sanctuary Fund raising \$569.50 (this was our second STP for First Parish this church year). Second, all were invited to send cards and well wishes to Maria the week of April 20th (each of the ten supporting congregations was assigned a designated week to send cards so that Maria would regularly receive mail). And, Mayra, our newest Task Force member, provided phrases in Spanish to augment our well wishes! Third, "techie" Rev. Heather produced two separate Zoom video "cards" with many WUS volunteers participating.

In capturing how the pandemic impacted our "hands on" immigration justice work and our



missing Maria, the start of the new church year began on a happier note. We ended the summer with a WUS volunteer sponsored potluck at First Parish honoring Maria. Great food, lots of laughter, and a lovely table setting were enjoyed by all. Gracious host Maria took the above 360-degree photo from our summer gala.

We started the fall energized and determined to grow our sanctuary volunteers. On September 29th, we challenged the congregation and our volunteers with a very ambitious goal of doubling our numbers. During coffee that Sunday, we invited folks that hadn't been involved in this work to "ask me about sanctuary". And, while we didn't double our numbers, our outreach efforts did result in 13 new members. We are now 46 strong delivering collectively 4100 hours over the past two year at First Parish!

And, your Task Force didn't rest there, we:

- Connected with WUS volunteers periodically
- Attended Coordinator meetings as part of a ten-member interfaith group providing 24/7 volunteer coverage
- Attended ICE Detention vigil services in South Boston
- Sponsored Share the Plate for First Parish Bedford's Sanctuary Fund and Catholic Community Services
- Supported Jericho Walks at Burlington's ICE Office
- Successfully sponsored and secured a \$750 grant from SAOC for the International Institute of New England, an exceptional organization dedicated to "welcoming, aiding, educating, employing and helping naturalize New England's refugees and immigrants"

So, what's next? We had hoped to be organizing another volunteer sponsored potluck dinner with Maria when church life slows down each summer. Now, we don't even know when we will see her again. Still we stay connected to First Parish on a monthly basis through Coordinator Zoom calls. Probably in the fall, they will be seeking donations to help with Maria's son Isidro's last two years of university in Guatemala. And, of course, now there is no hope with Maria's case being heard even though January 5, 2020 marked the second anniversary of her stay at First Parish. And so we wait.

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### Report of the Social Action & Outreach Committee

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"The Social Action and Outreach Committee shall assist members and friends of the Society to find areas in which they may study and act, both within the church and the larger community. A topic is appropriate for study and action if it raises questions of ethical, moral, or social value and if opportunities exist for members of the Society to translate their concerns regarding the topic into effective action. The Committee shall also be responsible for determining the recipients of such funds as the Society shall designate for charitable giving. The Committee shall not incur obligations on behalf of the Society in excess of the amount approved by the Standing Committee or make charitable contributions in excess of the amount voted by the Society." --  
The Winchester Unitarian Society By-Laws

Members of the Committee 2019 to 2020: Sue Doubler, Harris Gibson, Gordy McIntosh (chair), Claire McNeill (secretary), Patty Shepard, Martina Werner, and Patrick Draine (Standing Committee Liaison)

SAOC is the umbrella committee for two WUS groups: the Racial Justice Planning team and the Lex RAP support group.

Several members of the committee have increased our activities around the issues of **racial justice**, making stronger connections with the area NAACP. Patty coordinates the Black Lives Matter Working Group of UU Mass Action. Claire organizes the WUS racial justice book group, which helped plan several events: “Color of Law,” by Richard Rothstein (Oct 27) “Refugee” by Alan Gratz, coordinated with and held at the Winchester Library on Feb. 9, for parents and their children age 9 -12 “Indigenous People’s History of the US,” a UUA read, cosponsored by NSJ was held Nov. 17, discussion led by Rebecca Kelley-Morgan.

Book discussions held by Zoom: “How to be an Anti-racist” by Ibram Kendi on Sat. March 21, “Barracoon, The Story of the Last Black Cargo” by Zora Neale Hurston on Sunday April 26. The Racial Justice Planning team organized “Steps Toward DeCentering Whiteness” with the leadership of Meck Groot, Justice Ministries Lead for the UUA New England Region, a workshop on October 5, attended by 43 area UU congregants who are committed to anti-racist work. Drawing from the Commission for Institutional Change’s review showing how racial bias has impacted the UUA’s culture and practices, we explored the alternative: institutional conditions that promote equity and multiculturalism. Following the October 5 workshop, the team has been meeting during the year to explore ways to carry on the effort at WUS. In May, the SAOC team will present the group’s proposal to the Standing Committee: “transforming our Beloved Community, Winchester Unitarian Society, from a Multiculturally-aware Congregation Committed to Racial Justice, to an Intentionally Pro-active, Radically Inclusive Multicultural Anti-racism Congregation.”

#### Lex RAP planning group

Marianne Diblasi, our student minister, worked with a group of members (including Gordy and Claire) to educate the congregation about the work of this organization of volunteers in Lexington which supports refugees and asylum seekers. We helped a local team working with a Winchester family to become connected with LexRAP, and coordinated donations of supplies from the congregation. The planned March 14 fund-raiser for LexRAP, **Love Has No Borders**, had to be postponed due to the corona virus pandemic, and cancellation of all community

activities. The church loaned \$300 for the rent at Jenks, and SAOC approved \$100 from its budget for food.

Facilitated the efforts of members of the congregation:

Coordinated the donation of 33 Thanksgiving food boxes to the Council of Social Concern in Woburn. The minister gave \$300 from the Discretionary Fund for their December gift cards.

Women's Lunch Place. Deb Walsh continued to be the coordinator, arranging for six volunteers every second Saturday to leave WUS at 6:30 AM and help with food preparation at this day shelter in Boston.

Food pantry. Terry Currier coordinated food donations to the Council in Woburn

Other congregational activities:

- Alternative gift giving at Christmas
- Writing holiday cards to prisoners
- Facilitating members working on UU the Vote projects, including writing postcards to encourage people to vote by mail
- Supporting efforts to secure our rainbow and Black Lives Matter flags
- Working with the Network for Social Justice to distribute rainbow decals to downtown businesses to display in their windows
- Providing opportunities to support covid-19 relief efforts in the area

Share the Plate

Share the plate continues to be an important venue to share the congregation's generosity with a wide variety of charities and groups working for justice. Members of the Social Action and Outreach committee review proposed organizations. When approved, the group is added to the list from which the minister makes selections. Any member of the congregation may make suggestions to the committee.

Our weekly Highlights article is used to publicize events and provide volunteer opportunities related to our mission: finding areas to study and act in the larger community. *We encourage members of the congregation to share volunteering opportunities and ideas for social action projects with the committee.*

Grants

Each year the Winchester Unitarian Society donates 5 % of its budget to organizations that support our mission and vision, including Share the Plate. This committee reviews applications of groups sponsored by members of the congregation. We had \$20,624 to distribute this year—compared to \$21,322 for 2019.

The category of Justice to include Anti-racism and Multi-cultural groups. The distribution received by category of the 23 recipients of our 2020 annual grants are:

2020 grants		%
Poverty	\$ 11,550	56.0
International	\$ 2,150	10.4
Immigrants	\$ 1,750	8.5
Justice	\$ 1,700	8.2
Advocacy	\$ 1,521	7.4
Environment	\$ 1,000	4.8
Education	\$ 700	3.4
LGBTQI	\$ 250	1.2
		100.0

### Advocacy

**UU Mass Action \$971** [www.uumassaction.org](http://www.uumassaction.org) Since 2006 UU Mass Action has been mobilizing the 140 Unitarian Universalist congregations in Massachusetts around social justice issues. Their funding comes from UU congregations, individuals and grants. UU Mass Action organizes legislative lobbying efforts, holds workshops and provides a weekly calendar of justice events. This year the campaigns are: ending mass incarceration, economic justice, immigrant rights, and climate change. Working groups include: Black Lives Matter, Hunger and Homelessness, LGBTQI Rights, First Nations Rights, Gun Violence Prevention, and Muslim Rights. Our grant will go toward the Anti-Oppression Campaign, focusing on Immigrants and Muslims.

**Jobs with Justice \$300** [www.massjw.net](http://www.massjw.net) organizes working people and allies to fight for the rights of all workers, locally, nationally, and internationally. Our primary areas of work include workers' rights, immigrant rights, public education and global justice.

**Union of Concerned Scientists-\$250** [www.ucsusa.org](http://www.ucsusa.org) The Union of Concerned Scientists puts rigorous, independent science to work to solve our planet's most pressing problems. Joining with people across the country, we combine technical analysis and effective advocacy to create innovative, practical solutions for a healthy, safe, and sustainable future.

## Education

- **Winchester ABC \$700** <http://winchesterabc.org/> is a chapter of A Better Chance, Inc., a national nonprofit organization founded in 1963 to provide academically talented scholars of color with expanded educational and career opportunities. In 1971, Winchester ABC welcomed its first male scholars. Since then, more than 85 scholars have graduated from Winchester High School. Most have gone on to receive higher degrees. The grant will be used for enrichment and summer activities.

## Environment

**Wright-Locke Farm- \$250** [www.wlfarm.org](http://www.wlfarm.org) This historic working farm, established in the 1600s in Winchester, provides educational and volunteer opportunities for children and adults. The Town formed the Wright-Locke Farm Conservancy, Inc. to oversee the operation of the farmstead and arable fields. The full 20 acre site includes woodlands which connect to a conservation land in Lexington.

**Conservation Law Foundation-\$250** [www.clf.org](http://www.clf.org) CLF protects New England's environment for the benefit of all people. We use the law, science and the market to create solutions that preserve our natural resources, build healthy communities, and sustain a vibrant economy.

**Waltham Fields Community Farms \$250** <http://communityarms.org/> (WFCF) promotes local agriculture and food access through its working farm and education programs. Its practices are socially, ecologically, and economically sustainable. The WUS grant will help support its vision of creating universal access to food through sustainable agriculture.

**UU Ministry for Earth-\$250** [www.uumfe.org](http://www.uumfe.org) UUMFE empowers bold and accountable action for environmental justice among Unitarian Universalists and other people of faith and conscience. Join us in working to bring the interdependent web back into balance.

## Justice

**The House of Peace \$500** [www.houseofpeaceinc.org](http://www.houseofpeaceinc.org) The mission of the House of Peace is to provide physical and spiritual shelter to victims of war in a small healing community in companionship with adults with special needs, and to provide education for peace and moral awakening. The WUS grant will provide care for burn victims from Iraq and Syria living at the House of Peace.

**Network for Social Justice \$700** <https://www.wmcn.org/> The Winchester Network for Social Justice promotes the recognition, understanding, and appreciation of diversity, advocates for each and every person's civil rights, and confronts intolerance. This past year WUS and the Network co-sponsored two events. The Network requested unrestricted funds to be able to respond quickly to emerging needs aligned with its core mission.

**Royall House and Slave Quarters \$500** <http://www.royallhouse.org/> explores meanings of freedom and independence in the context of wealthy Loyalists of the American Revolution and enslaved Africans. WUS has been asked to subsidize a program for elementary students from low- income communities.

### **Immigration and Refugee Support**

**Lexington Refugee Assistance Program-\$1000** [www.lexrap.org](http://www.lexrap.org) The mission of LexRAP is to support and to assist refugees and asylum seekers into American society.

This assistance includes a support network for housing, food, clothing, transportation, health care, education (especially English), employment, legal aid, and socialization.

**The International Institute of New England (IINE) \$750** <https://iine.org/> was founded 100 years ago. In 2018 it resettled 194 refugees who survived desperate situations in countries like the Democratic Republic of Congo, Myanmar, Syria, and Afghanistan. It provides English instruction, employment services and pathways to citizenship. Funded with a combination of federal grants and donations, it serves people in Lowell, Boston and Manchester, New Hampshire.

### **International**

**UU Service Committee \$1350** [www.uusc.org](http://www.uusc.org) The UUSC advances human rights both in the US and in 12 countries around the world. UUSC's work to promote social, economic and environmental justice is grounded in the belief that all people have inherent power, dignity, and rights. Working with local organizations it assists people who have been marginalized.

**El Hogar-Honduras \$800** [www.elhogar.org](http://www.elhogar.org) El Hogar provides a quality education and a safe and nurturing home to poor and disadvantaged children in Honduras. Our goal is to break the cycle of poverty so that our students can fulfill their potential as productive and independent Honduran citizens.

### **LGBTQ / Arts**

**Coro Allegro \$250** <http://www.coroallegro.org/> is a classical chorus composed of members and friends of the LGBTQ community, performing in the Boston area. Each of its concerts highlights an important social issue, such as racism or human rights. In 2017 our grant was used toward an original work bearing witness to the Arab uprisings.

### **Poverty**

**Council of Social Concern (Woburn)-\$2000** [www.socialconcern.org](http://www.socialconcern.org) This community agency coordinates services for over 2000 residents of Woburn and Winchester each year, providing affordable quality child care, food assistance, family skill building, and referral services. Our

congregation also supports the Councils work by donating over 30 Thanksgiving baskets and monthly food donations.

**Winchester Farmers Market \$500** <https://www.facebook.com/winchfarmmkt/> is launching Anna's Fund to offer financial assistance to families in Winchester/ Woburn and neighboring towns. In order to support those who wish to obtain fresh, local produce, the fund will double any SNAP benefits up to \$10 per customer card per market day. The fund will start at \$4,000, of which WUS will provide \$700.

**Mission of Deeds \$750** <http://www.missionofdeeds.org/> provides beds, bedding and basic household items to people in poverty in Middlesex and Essex counties. Not only does it enable the reuse of donated items, but it provides a large group of volunteers an opportunity for meaningful service. Last year Mission of Deeds helped more than 2600 individuals.

**Unitarian Universalist Urban Ministry \$7300** [www.uuum.org](http://www.uuum.org) WUS is one of 35 member congregations. Because of its affiliation and extensive community work, this is our major grant recipient. Through the UUUM's extensive network of volunteers they are able to provide education and enrichment programs for the children and youth of Roxbury and surrounding communities. They also provide emergency shelter for individuals and families fleeing domestic violence, and job and education readiness training for survivors of domestic violence. The grant is helping fund 3 specific programs of the UUUM which address the above issues. They are Believe in Success, the Roxbury Youth Programs, and Community Engagement.

**Women's Lunch Place \$500.** <https://womenslunchplace.org/> The Women's Lunch Place (WLP) provides breakfast and lunch to homeless and poor women in Boston, along with many advocacy and support services. This year WUS, under the leadership of Deb Walsh and Joi Loewy, has sent 6-8 volunteers to WLP to prepare and serve meals on the second Saturday of each month.

**On The Rise-\$250** [www.ontherise.org](http://www.ontherise.org) On The Rise is responsible for creating an environment where people of very different backgrounds feel respected and valued. An essential outcome of the day program is caring, constructive, competent relationships. On The Rise builds relationships upon a foundation of nonjudgmental engagement, respect, dignity, honesty and accountability.

**United Teen Equality Center (UTEC)-\$250** [www.utedinc.org](http://www.utedinc.org) UTEC's mission and promise is to ignite and nurture the ambition of our most disconnected young people to trade violence and poverty for social and economic success. Today we serve Lowell, Lawrence, and Haverhill, MA and are [nationally recognized as a model agency](#) serving justice-involved young adult.



# Winchester Unitarian Society

## ACCOUNT QUICKREPORT

September 2019 - August 2020

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	ACCOUNT	CLR	AMOUNT	BALANCE
<b>7800 Social Action Grants</b>								
<b>7820 SOC Share the Plate Grants</b>								
09/30/2019	Check	39365	House of Peace	STP 9/15/19 - House of Peace	7820 Social Action Grants:SOC Share the Plate Grants		300.50	300.50
09/30/2019	Check	39366	Mystic River Watershed Association	STP 9/8/19 - Mystic River Watershed Association	7820 Social Action Grants:SOC Share the Plate Grants		294.00	594.50
09/30/2019	Check	39367	Hospice & Palliative Care Fedn of MA	STP 9/22/19	7820 Social Action Grants:SOC Share the Plate Grants		374.00	968.50
09/30/2019	Check	39379	Unitarian Universalist Association c/o Side of Love Campaign	STP 9/29/19 - Side with Love Campaign	7820 Social Action Grants:SOC Share the Plate Grants		359.00	1,327.50
10/30/2019	Check	39404	LexRAP	STP 10/13/19	7820 Social Action Grants:SOC Share the Plate Grants		317.00	1,644.50
11/01/2019	Check	39411	Patty Shepard	STP 10/6/19 for WUS Sponsorship of Freedom Fund Basket - NAACP	7820 Social Action Grants:SOC Share the Plate Grants		250.00	1,894.50
11/01/2019	Check	39430	NAACP - Mystic Valley Area	Patty's check #478 prepaying for WUS Sponsorship of the MVAB NAACP Freedom Fund Basket	7820 Social Action Grants:SOC Share the Plate Grants		-250.00	1,644.50
11/01/2019	Check	39430	NAACP - Mystic Valley Area	STP 10/6/19	7820 Social Action Grants:SOC Share the Plate Grants		315.50	1,960.00
11/07/2019	Check	39438	US Forest Service	STP 11/3/19 - US Forest Service - Plant-A-Tree program	7820 Social Action Grants:SOC Share the Plate Grants		0.00	1,960.00
11/08/2019	Check	39431	Network for Social Justice	STP 10/20/19	7820 Social Action Grants:SOC Share the Plate Grants		281.50	2,241.50
11/27/2019	Check	39453	Veterans Education Project	STP 11/10/19 - Veterans Education Project	7820 Social Action Grants:SOC Share the Plate Grants		304.00	2,545.50
12/05/2019	Check	39467	North American Indian Center of Boston	STP 11/17/19	7820 Social Action Grants:SOC Share the Plate Grants		454.00	2,999.50
12/05/2019	Check	39470	Chase Card Services	STP 11/3/19 - A Living Tribute	7820 Social Action Grants:SOC Share the Plate Grants		304.00	3,303.50
12/05/2019	Check	39470	Chase Card Services	STP 10/27/19 - Caminamos Juntos	7820 Social Action Grants:SOC Share the Plate Grants		641.50	3,945.00
12/05/2019	Check	39471	WUS-MDF	STP 11/24/19 - Minister's Discretionary Fund	7820 Social Action Grants:SOC Share the Plate Grants		896.00	4,841.00
12/13/2019	Check	39485	Mission of Deeds	STP 12/1/19 - Mission of Deeds	7820 Social Action Grants:SOC Share the Plate Grants		380.50	5,221.50
12/20/2019	Check	39492	Black Lives of UU	STP 12/8/19 - Black Lives of UU	7820 Social Action Grants:SOC Share the Plate Grants		556.00	5,777.50
01/23/2020	Check	39523	First Parish Bedford	STP 1/5/20 - First Parish Bedford (Sanctuary Ministry Program)	7820 Social Action Grants:SOC Share the Plate Grants		350.00	6,127.50
01/30/2020	Check	39555	Equal Justice Initiative	STP 1/19/20 - Equal Justice Initiative	7820 Social Action Grants:SOC Share the Plate Grants		354.00	6,481.50
01/31/2020	Check	39553	El Hogar Ministries, Inc.	STP 1/12/20 - El Hogar	7820 Social Action Grants:SOC Share the Plate Grants		529.00	7,010.50
02/07/2020	Check	39571	Chase Card Services	STP 12/22/19 - Anti Defamation League	7820 Social Action Grants:SOC Share the Plate Grants		330.00	7,340.50
02/07/2020	Check	39571	Chase Card Services	STP 12/29/19 - American Civil Liberties Union	7820 Social Action Grants:SOC Share the Plate Grants		222.00	7,562.50
02/07/2020	Check	39571	Chase Card Services	STP 12/15/19 - BIJAN - Pay via paypal	7820 Social Action Grants:SOC Share the Plate Grants		469.00	8,031.50
02/07/2020	Check	39572	Katie Tyson Fund	STP 1/26/20 - Katie Tyson Fund	7820 Social Action Grants:SOC Share the Plate Grants		406.50	8,438.00
02/13/2020	Check	39579	Catholic Community Services	STP 2/2/20 - Casa Alitas Program	7820 Social Action Grants:SOC Share the Plate Grants		426.50	8,864.50
02/21/2020	Check	39584	Brio Integrated Theatre	STP 2/9/20 - Brio Integrated Theatre	7820 Social Action Grants:SOC Share the Plate Grants		298.50	9,163.00
02/28/2020	Check	39594	LWVMA Citizen Education Fund	STP 2/16/20 - League Women Voters of Massachusetts Citizen Education Fund	7820 Social Action Grants:SOC Share the Plate Grants		411.00	9,574.00
03/06/2020	Check	39606	Community Change Inc	STP 2/23/20 - Community Change, Inc.	7820 Social Action Grants:SOC Share the Plate Grants		358.00	9,932.00
03/12/2020	Check	39612	Unitarian Universalist Assn.	STP 3/1/20 - UU the Vote	7820 Social Action Grants:SOC Share the Plate Grants		273.00	10,205.00
03/26/2020	Check	39618	WUS-MDF	STP 3/15/20 Minister's Discretionary Fund	7820 Social Action Grants:SOC Share the Plate Grants		348.00	10,553.00
03/26/2020	Check	39619	Health Care For All	STP 3/8/20 - Health Care For All	7820 Social Action Grants:SOC Share the Plate Grants		277.00	10,830.00
04/03/2020	Check	39631	Council of Social Concern	STP 3/22/20 - Council of Social Concern	7820 Social Action Grants:SOC Share the Plate Grants		366.50	11,196.50
04/10/2020	Check	39639	WUS-MDF	STP 3/15/20 Minister's Discretionary Fund - Vicky Coccoluto \$500	7820 Social Action Grants:SOC Share the Plate Grants		500.00	11,696.50
04/10/2020	Check	39643	Women's Lunch Place	STP 3/29/20 Women's Lunch Place	7820 Social Action Grants:SOC Share the Plate Grants		402.00	12,098.50
04/27/2020	Check	39664	Council of Social Concern	STP 3/22/20 - Council of Social Concern	7820 Social Action Grants:SOC Share the Plate Grants		55.00	12,153.50
04/27/2020	Check	39665	Women's Lunch Place	STP 3/29/20 Women's Lunch Place	7820 Social Action Grants:SOC Share the Plate Grants		10.00	12,163.50
<b>Total for 7820 SOC Share the Plate Grants</b>							<b>\$12,163.50</b>	
<b>Total for 7800 Social Action Grants</b>							<b>\$12,163.50</b>	
<b>TOTAL</b>							<b>\$12,163.50</b>	

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## Report of the Youth Advisory Committee

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**Committee Members:** Patrick Flaherty (chair), Marcy Tompson, Roofus Hoffmann, Sarah Milt, Christine Drane, Jenny Nordan, Terry Currier (SC liaison)

**Staff Members:** Sam Wilson (Director of Youth Ministries) Sam is in his 6th year as DYM, Haley Wegner (Assistant Director of Youth Ministries) Haley is in her 5th year as ADYM. \*\*Haley has recently announced her resignation from this position. YAC would like to wish her all the best in future endeavors and we would also like to thank her heartily for all of the wonderful work she has done to nurture the members of WUSYG during her time in this position.

**Terms:**

Sarah (3/3)

Marcy (3/3)\*\*

Roofus (2/3)

Patrick (2/3)

Christine (1/3)

Jenny (1/3)

*\*\*Marcy will begin a new three-year term in September. Currently, we have one vacancy for next year's committee.*

**Summary:** The Youth Advisory Committee (YAC) meets once per month to discuss important issues, upcoming events, fundraising efforts, educational and spiritual growth, social-emotional well-being, spirituality, and day-to-day scheduling concerns surrounding the Winchester Unitarian Society Youth Group (WUSYG). Our primary mission is to assist Sam and Haley in their efforts to maintain WUSYG's high standards. I know that I speak for the entire committee when I say that we are consistently impressed by Sam and Haley's professionalism and their strong commitment to the important work that they do.

**Service Trip:**

The service trip this year was scheduled for the week of April vacation. The group was set to go to War, West Virginia. A great deal of planning went into this trip, led by Sam and Haley. Fundraising was successful and everything was set for the trip...but, Covid-19 ruined the plans!!! Fortunately, some of this planning will not go to waste as WUSYG currently plans to go on this service trip in April 2021.

**Family Handbook & Covenant:**

Sam and Haley collaborated to publish an updated handbook for WUSYG parents and families. This is a valuable resource and a great deal of effort was put into its creation. This year we also created a covenant with our parents at the start of the year, which helped define our

expectations of each other through the year. It seemed like this helped participation in our fundraisers.

### **What's Up WUSYG?:**

Sam and Haley have continued this “extra, optional” monthly meeting this year. Attendance does tend to vary depending on the time of year, but YAC feels that this added time is extremely beneficial for the WUSYG members. During the current Covid-19 Crisis, Sam and Haley have increased the frequency of these meetings to weekly (virtually, of course). This is a strong example of the thoughtfulness that goes into Sam and Haley’s work and decision-making.

### **WUSYG Church Year Events:**

- Welcome Back BBQ
- Annual Fall Retreat
- Fall Fest Fundraiser
- December fundraiser (after the Pageant)
- WUSYG Holiday Party
- WUSYG Church Sleep-over
- Chili cook-off (cancelled)
- Service Trip to War, WV (cancelled)
- Youth Sunday (virtual)- \*\*\*This year’s Youth Sunday was a fantastic success. Sam and Haley (and the five WUSYG seniors: Charlotte Bradley, Elizabeth Tian, Evan Forcucci, Rachel Milt, and Elizabeth Sharon) deserve HUGE congratulations for putting together an amazing service. Additionally, special thanks to Max Mackay for video editing, Elizabeth Tian for creating the title slides, and Music Director John Kramer for serving as Video Coordinator. This virtual service (which was recorded) will undoubtedly be an event which will be looked upon as a major success during these difficult times.
- Virtual fundraiser in June

I feel blessed to have had the opportunity to serve this congregation as Chairperson of YAC. I look forward to continuing on the committee for another year (at least). I admire the hard work and dedication of Sam and Haley in everything that they do for WUSYG. It will be very difficult for the congregation to find a suitable replacement for Haley; I truly hope that the Standing Committee realizes how important it is for Sam to have the opportunity to regularly collaborate with an effective ADYM that is compatible with his work ethic.

Submitted with love and gratitude,

Patrick Flaherty

Committee Chairperson

On behalf of the Youth Advisory Committee 2019-2020

<b>Winchester Unitarian Society</b>		
<b>Proposed Slate of Officers, Representatives and Committee Members</b>		
<b>as of May 15, 2020</b>		
term ending in	term ending in	term ending in
<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>Standing Committee (9 elected members, 3 annually for 3-year terms)</b>		
Patty Cameron	Robbie Brown	Ivan Correia
Mike Hyde	Patrick Draine	Terry Currier
James Pidacks	Fritzie Nace	
Sheila Puffer		
<b>Clerk (annual term)</b>		
<b>TBD</b>		
<b>Co-Treasurers (annual term)</b>		
Sue Kiewra		
Judy Murray		
<b>Assistant Treasurer (annual term)</b>		
Stacy Colella		
<b>Moderator (annual term)</b>		
Martin Newhouse		
<b>Denominational Affairs Representative</b>		
Jennifer Edwards		
<b>Trustees of Permanent Funds (3 elected members, 1 annually for 3-year term)</b>		
Jennifer Dougherty	Amy Hunter Maguire	Kathryn Maffei
<b>Employee Relations Committee (3 elected members, 1 annually for 3-year term)</b>		
Nancy Scott Newhouse	John Russell	Sara Delano
<b>Fellowship Committee (6 elected members, 2 annually for 3-year terms)</b>		
Lindy Brown	Tyson Kamikawa	Sean Crowley
Sheila Rudolph-Correia		<b>TBD</b>
Jim Tilley		
<b>Growth and Learning Committee (6 elected members, 2 annually for 3-year terms)</b>		
Suspended pursuant to Section 4.2 of the By-Laws		
<b>Membership Committee (6 elected members, 2 annually for 3-year terms)</b>		
Naomi DeLairre	Deb Eiler	Sophia Sid
Gloria Legvold	Robin Wolf	
Marilyn Mullane		
<b>Music Committee (9 elected members, 3 annually for 3-year terms)</b>		
Joe Eiler	Joan Baldwin	Joi Loewy
Kathryn Maffei	Lauri Clark	Jack McCreless
Carolyn Schatz	Dirck Stryker	Jayne Zeamer
<b>Nominating Leadership Development Committee (4 elected members, 2 annually for 2-year terms)</b>		
Kristine Kamikawa	Phil Coonley	
Liz Lintz	<b>TBD</b>	
<b>Religious Education Committee (6 elected members, 2 annually for 3-year terms)</b>		
Erin Graham	Lucille Cannava	Naomi Magnoni
Ryan Levering	Karen Caputo	Sarah Milt
<b>Social Action and Outreach Committee (7 elected members for 3-year terms)*</b>		
Patty Shepard	Harris Gibson	Sue Doubler
Martina Werner	Claire McNeill	Gordy McIntosh
<b>*Pending congregational vote to reduce the committee size from 9 to 7 members.</b>		<b>TBD</b>
<b>Youth Advisory Committee (6 elected members, 2 annually for 3 year terms)</b>		
Patrick Flaherty	Christine Drane	Marcy Tompson
Roofus Hoffmann	Jenny Nordan	<b>TBD</b>