

Winchester Unitarian Society

Annual Report

2020-2021

154th Annual Meeting

Sunday, May 16, 2021

Meeting convenes at 11:45 am (via Zoom)



Winchester Unitarian Society

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Warrant for the 154th ANNUAL MEETING of the Winchester Unitarian Society

Sunday, May 16, 2021
Meeting convenes at 11:45 a.m.

The 154th Annual Meeting of the Winchester Unitarian Society will be held via ZOOM at <https://tinyurl.com/WUSworship> on May 16, 2021, following the Sunday service, to consider the following:

- Article I** To hear and act on the Minutes of the May 31, 2020 ANNUAL MEETING.
- Article II** To hear and act on the Minutes of the October 18, 2020 SPECIAL MEETING.
- Article III** To hear and act on the Report of the Minister, the Reverend Heather Janules.
- Article IV** To hear and act on the Report of the Church Administrator Thomas Slack.
- Article V** To hear and act on the Report of the Director of Lifespan Religious Education Rebecca Kelley-Morgan
- Article VI** To hear and act on the Report of the Director of Youth Ministries Sam Wilson.
- Article VII** To hear and act on the Report of the Music Director John Kramer.
- Article VIII** To hear and act on the Report of the Trustees of the Permanent Funds.
- Article IX** To hear and act on the Report of the Standing Committee.
- Article X** To hear and act on the Co-Treasurers' Report for the Fiscal Year ending August 31, 2020, and the Co-Treasurers' Estimated Report for the year ending August 31, 2021.
- Article XI** To hear and act on the preliminary budget recommended by the Standing Committee for the year ending August 31, 2022.
- Article XII** 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, 2022; 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.
- Article XIII** To hear and act on the Report of the Nominating and Leadership Development, and to elect officers and committees for the ensuing year.
- Article XIV** To hear and act on any other business that may legally come before this meeting.

By order of the Standing Committee, George Wood, Clerk

153rd ANNUAL MEETING Minutes
Winchester Unitarian Society
Sunday, May 31, 2020

Moderator Martin Newhouse called the Zoom version of 153rd meeting to order at 11:45 am. Introductions and guidelines for the Zoom meeting were given. An explanation of Governor Baker's declarations allowing virtual meetings valid regardless of bylaws was provided. Additional information about how to proceed through the meeting using zoom tools for discussion and voting was also provided. During discussions there may be some additional information provided through screen sharing to help facilitate discussions.

A quorum was established with 73 members identifying themselves.

A quorum being present, the meeting opened with Rev Heather providing a blessing for the meeting and for the participants. Names of members who passed since our last Annual meeting: Michael Costa, Madeline Smith and Linda Reck were announced.

Article I –Treasurer's Report.

Lee Barton makes the motion:

I move that the **Treasurer's Report for the Fiscal Year ending August 31, 2019, and the Treasurer's Estimated Report for the Fiscal Year ending August 31, 2020 be approved.**

Motion seconded and discussion opened.

At start of discussion, Sue Kiewra – Co-Treasurer and co-host presented information and shared screen with budget information.

- WUS ended the year in the black, with \$3,441.
- Current fiscal year budget deficit expected to be \$9K and now expect deficit of \$39K because of COVID19 (C19) impact.
- No annual fundraiser, fewer donations, etc.
- Reserves will be down by \$25K after Concert Series donation (exceeded goals) and reduced expenses.

With 80 yes, 0 no, and 1 abstain, **MOTION Passed**

Article II – preliminary budget recommended by the Standing Committee

Peter McIntee made the motion:

I move that the **Standing Committee's recommended preliminary budget for the Fiscal Year ending August 31, 2021, be approved.**

Motion seconded and discussion opened.

Judy Murray, Co-Treasurer opens discussion: In part of the Treasurer's report, the gratitude list for Trustees and Financial Advisors omitted Amy Maguire in error, please include the name. A budget deficit is being presented by Treasurers for the third year in a row. This is an ominous trend.

Judy reviewed the report noting:

- Fiscal year begins on Sept 1, 2020
- Pledge count is down from 136 to 114 (partially explained by C19)
- Review of discussions and votes to implement some cost savings.
- Reduction of Cost of Living raises, reduction of SOAC Grants to 4% and maintain contributions to UUA at same level as this year.
- Payroll Protection Program, federal Small Business Loan offered with portions are forgivable, that we got through Needham Bank around \$80K.
- Reduced income from tenants because of C19

With 78 yes votes 0 no and no abstentions, **MOTION Passes**

Article III Nominations

Nancy Scott Newhouse makes the motion:

I move that the nominations be closed and that the Clerk be instructed to cast one ballot in favor of the slate presented by the Nominating and Leadership Development Committee.

Motion seconded and discussion opens.

Liz Lintz presents the Nominating Committee slate to the congregation. Reminds us of purpose. Noting the most current version is shared on line.

5 details about the report to highlight for everyone

- Heather Hannon is added to the Fellowship Committee
- There are four open positions, highlighted.
- Growth and Learning Committee has been temporarily suspended. Purpose is to offer adult programming, which is now done by many other teams and committees as part of their own work.
- Social Outreach & Action Committee was asked to have a temporary modification decreasing its required membership from 9 to 7 to see if this smaller size group would be able to complete the work of the committee. Trial was successful and they are in favor of reducing size permanently. Waiting for fall to vote on this.
- Many committee members have agreed to stay another year, but not a full term, so many are listed in term ends in 2021 and many fewer names in the 2022 cohorts.

Discussion – Raise hands to be called

MOTION Passes

Article IV – Financial Authorization

Liz Lintz makes the motion:

I move that the Congregation authorize to 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.

Motion seconded and discussion opens.

Discussion – Raise hands to be called. James P. explains that the full motion is not written out in poll because of limited number of characters allowed by Zoom poll. Please vote as if the full motion were spelled out in the poll.

MOTION PASSES with 73 yes, 0 no and no abstentions

Article V – Call Special meeting of Congregation

Maggie Russell makes a motion:

I move that a special meeting of the congregation be held 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.

Motion is seconded and discussion follows

Discussion –

MOTION Passes with 65 yes, 0 no and no abstentions

Article VI To hear and act on any other business that may legally come before this meeting.

There being no further business, the Moderator calls for a motion to adjourn.

Motion to adjourn made and seconded, and approved by a unanimous show of hands.

Meeting is adjourned at 1:15pm.

Thanks from James and Martin, with sighs of relief that there were no computer program crashes. Many notes of thanks to moderators and co-hosts written in the Zoom comments.

Minutes recorded and respectfully submitted by Mary McIntosh, clerk.

SPECIAL CONGREGATIONAL MEETING Minutes
Winchester Unitarian Society
Sunday, October 18, 2020

Moderator Martin Newhouse called the Zoom version of the special meeting to order at 11:45 am. Introductions and guidelines for the Zoom meeting were given. Additional information about how to proceed through the meeting using zoom tools for discussion and voting was also provided. During discussions there may be some additional information provided through screen sharing to help facilitate discussions.

A quorum was established with sixty-six voting members present.

With a quorum is present, the meeting opened with Rev Heather providing a blessing for the meeting and for the participants.

Article I – Revised Budget

I move that the revised budget recommended by the Standing Committee for the fiscal year ending August 31, 2021 be approved.

The motion was seconded by multiple hands raised.

Discussion – Raise hands to be called

At start of discussion, Sue Kiewra and Judy Murray – Co-Treasures presented information and shared screen with revised budget information. Key to presentation the PPP loan was forgiven and prior budget cuts were restored.

Discussion followed asking details on budget.

Motion passes.

Article II – I move the proposed change to the membership requirement of the Social Action and Outreach committee specified in Article 15 Section 2 of the Bylaws that would reduce the number of elected members from nine to seven.

Moderator Martin Newhouse noted motions to change the bylaws require a two-thirds majority.

The motion was seconded by multiple raised hands.

Lively and spirited discussion followed. It was noted the committee had operated shorthanded for more than two years. Volunteers to fill the vacate positions could not be found.

The motion passes.

Article III To hear and act on any other business that may legally come before this meeting.

Motion made and seconded by multiple raised hands,.

Discussion: Martin: Hearing none,

Raised hands show Motion Passes

Call for a motion to adjourn, seconded, meeting is adjourned at 1:15pm.

Thanks from James and Martin, with sighs of relief that there were no computer program crashes. Many notes of thanks to moderators and co-hosts written in the Zoom comments.

Minutes recorded and respectfully submitted by Mary McIntosh, clerk.

Report of the Parish Minister The Rev. Heather Janules



If it is true that “a picture is worth a thousand words,” this photo sums up much of the 2020-21 year for me.

The people of the future reading this report may wonder why a photo of a living room, converted into an ad hoc audio/visual broadcasting center, is part of the minister’s Annual Report. Last year, I wrote that “the financial, psychological and social impact [of the coronavirus pandemic] has been significant and it is unclear how and when it will be safe to return to

‘normal’ life again.” Little did I know then that a year later, we would still be worshipping, connecting, learning, meeting and leading through virtual platforms now.

We did not choose it but this past year has been a long-term exercise in significant adaptation, creativity, patience and reimagination, within and beyond the congregation. By now, we know there is no complete returning to what we knew before. The question – the spiritual question – is “What kind of new normal do we want to create?” Congregations, at heart, are change-makers, moving “the world as it is” toward “the world as

it should be.” As we continue to strive for a better world for all, we will also be answering the question about our congregation’s “new normal” in the coming year.

Last year, I also observed 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..” This understanding and experience was only strengthened in this past year of pandemic ministry. The details of our collective compassion, generosity and renewal can be found in my summation below.

We must also acknowledge the sobering political context of this year. The armed insurrection at the US Capitol on January 6th was the culmination of so many efforts leading us away from democracy and towards autocracy. While our democratic system was, in the end, preserved, the threats to our political system and our cherished Unitarian Universalist values remain.

Along with navigating the pandemic and the chaotic political landscape together, much of our focus this year has been on our Religious Education program. Our Visioning Team has proposed a path forward as we begin our next chapter in family ministry as Rebecca Kelley-Morgan completes her twelfth and final year serving as Director of Lifespan Religious Education. This next chapter will continue to be influenced by the pandemic as children, the ones without vaccinations as viral variants evolve, are now physically vulnerable in ways older adults were at the beginning of the pandemic. Virtual ministry is particularly challenging with our youngest friends so the need to innovate as we carefully maintain safety will continue.

Every year includes losses and the grief that comes with saying goodbye. We remember WUS members Eleanor Baldwin, Judy Virnelli, Dan Hritzay and Sam Berliner III. While some of these remarkable people were honored in the November 2020 Remembrance service, I look forward to remembering their lives through in-person memorials when it is safe to gather indoors again.

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 FY21 to date:

The fiscal year began with a balance of \$7786.03. To date, there has been \$3743.39 in expenses (These expenses were for grocery gift cards for local community members in financial need, a donation to Woburn High School Dollars for Scholars program, a donation to the Cambridge Insight Meditation Center - in memory of Patty Shepard’s spouse, Ron Denhardt - and a donation to Feed the People-Dallas in response to the southern ice storm crisis. In response to job loss or temporary furlough, the Fund also provided monthly \$200 checks for three households within WUS for varying amounts of time plus one \$100 gift for a fourth. It also financed monthly supplies for the local refugee family we have been supporting as we are no longer gathering in person to collect

donated goods.) There have been deposits and donations in the amount of \$3,428.15, leaving a balance of \$7470.79.

More so than any other time in my almost sixteen years of ministry, the Discretionary Fund provided direct support to people facing significant financial challenges. Many WUS members gave generously to the Fund this year without being asked. This thoughtful investment in our congregation and its values is humbling.

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

Rites-of-Passage

- This year, I led or co-led a number of memorials
 - I led a graveside service for Lynn Cummings, daughter of Roy and Leona Cummings
 - With Music Director John Kramer, I led a virtual memorial for Linda Reck
 - I coordinated a virtual memorial gathering in recognition of Brad Steele's mother, Ruth Reid Gjessing
 - I led a graveside service for a non-member family. By the end of this fiscal year, I will have led a second one on June 6th
 - I led a non-member virtual memorial for a member of my previous congregation

Pastoral Care

Beyond connecting 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
- Instituted weekly "Outdoor Office Hours" to ensure a safe way to be available in person to the congregation. Office Hours became virtual during the colder months and in inclement weather
- Participated in monthly informal "Coffee and Conversation" gatherings led by the PCAs

Spiritual Development

- Co-facilitated a monthly Soul Matters covenant group based on the monthly themes
- Continued an adult education class based on the television program "The Good Place," exploring seasons 3 and 4
- Worked with Phil Coonley, Liz Lintz and Rebecca Kelley-Morgan to offer the six-session leadership and faith development adult program, Harvest the Power
- Led a Saturday workshop on UU Theology as part of the UUA's Commission on Institutional Change's *Widening the Circle of Concern* report
- Began weekly meditation sessions on Fridays in the spring

Social Justice

- Organized regular distribution of resources from the Ministers Discretionary Fund to members whose income has been impacted by the coronavirus pandemic
- In last program year but after the May, 2020 Annual Meeting, worked with community leaders to host a vigil at WUS in response to the murder of George Floyd by a police officer
- Participated in monthly staff meetings focused on anti-racism as part of our congregational work
- Organized an effort to “hire” knitters economically impacted by the pandemic to replenish our Prayer Shawl inventory
- Represented WUS in a virtual “panel discussion” organized by Network for Social Justice to discuss how different local organizations are integrating anti-racism into their work

Administration

- Met regularly with program staff: Thomas Slack, Rebecca Kelley-Morgan, Sam Wilson, Sam and Rebecca together and John Kramer
- 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 times of conflict or concern. I companioned two colleagues through particularly challenging circumstances along with more short-term situations
- Served as co-moderator of the Greenfield Study Group
- Resumed my work as a clergy coach with one “coachee”
- Served as a guest preacher for the UU Church of Tampa

Beyond the Congregation

- Regularly attended the Winchester Interfaith Council when meetings were held
- Attended Winchester Coalition for a Safer Community meetings when possible

Continuing Education

- Continued monthly meetings with my clergy coach and clergy support groups

This program year also included a six-week sabbatical, from January 1-February 13. I am grateful to Sabbatical Minister Kye Flannery and all those who made this much-needed pause possible. This short sabbatical was in lieu of an intended three-month sabbatical. The intention is to take a four-month sabbatical in FY22 from January-April.

Thank you for the many ways you have affirmed my faith and resilience in this very challenging year. I remain honored to serve as your minister and look forward to what lies ahead!

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

I did not think when I wrote last year's annual report that we would still be remote, and still tiptoeing toward the end of restrictions on gatherings. Last spring, we were still in crisis response mode, and while I can't say we've settled into a new normal, we have settled into a pandemic routine. That routine will change, as Public Health and guidance changes, but it's unlikely to do so before my departure this summer.

After the conclusion in the 2019-2020 CORE report that sustainable staffing budgets were attainable by reducing the Lifespan Religious Educator position, I resigned just before the Pandemic lockdowns began in March of 2020. My resignation will be effective after we complete the program year and I finish up some post program year tasks. I will be moving on to other work and I wish you well as we part company after more than a decade **and** a pandemic together.

As the Winchester Unitarian Society begins to turn towards more in person gatherings, and an eventual return to onsite worship and programs, one of the important considerations, particularly for children, is that we are slow and gentle with each other. Return is complicated by the trauma that all have experienced, the losses, and the personal isolation necessitated by pandemic. You will need to build and rebuild relationships, to re-socialize children to what it means to be at Winchester Unitarian and a part of a faith community. Since everyone is beginning again, even though it might seem like the worst time for anything else to adjust to, it's not a bad time for staff transitions.

It's been a tough 14 months. Our younger families are exhausted, screened out, over it, as are many older youth, young adults, empty nesters, and solo or companioned adults. I hope you will avoid the impulse to make 2021-2022 look like 2019. I hope that you will remember that until this past year we have taught children the inverse of what we now must teach to maintain social distance and avoid cross contamination. I hope that you will remember that our faith is predicated on relationships. We are not united by creed, but rather by covenant, and our covenant calls us together as a faith family, not only in good times, but in the hardest times of all. And those hard times call for trust, patience, spaciousness, and the slow deliberate rebuilding of community connections.

Sunday Morning Children's programs: Last spring we offered family worship on Friday evenings, trying to give people an additional opportunity to connect, since all activities outside the home had ceased. After the response to that day and time change experiment and a subsequent poll of the more devoted families, we moved the time back to Sunday morning at 10:00 AM.

All the children's programs through eighth grade are detailed in the Religious Education Committee report. I will touch on them lightly here. As the committee report described, our greatest challenge has been to engage families and middle schoolers. Those we don't see often or see at all, have indicated that they have no interest in Soulful Home packets delivered to homes, online pew packs, online Religious Education, or family worship services until they are no longer virtual. All of those have been tried out for a significant time, and what remains viable is Family Worship and Crossing Paths although the cohort regularly attending both is quite small.

Those who were comfortable with an outside gathering, using Covid protocols, met up at WUS to tend the garden this summer, and when September arrived, picnics and socializing at WUS following the worship services until the weather put an end to them for the winter. Those are resuming this spring, as the weather allows. We began with the canned good hunt and will continue to find activities involving the garden and following the interest of the children through the rest of the program year and into the summer.

The animated messages I've developed for family worship and First Reflections are the online offerings that have garnered the most enthusiasm and interest. Those (most of them) that use original, public domain or licensed (to me for use) content are up on a public facing Winchester Unitarian Society YouTube page.

Potluck Theology: Is detailed in the Religious Education Committee's report. The two virtual evenings were led by me, In February card making, and some didactic content on the idea of agape love. In March we dyed eggs, for our SECOND annual and virtual egg dying, with an explanation of equinox and the symbols of spring.

JanFest: Like everything else this went virtual this year with four breakout rooms to hold individual workshops, and in a first, participation from WUSYGers. All members of the congregation were invited to participate.

Connections: We had a couple of drop off and pick up programs. Blank ornaments were left outside WUS for people to pick up, decorate, and return in a socially distanced exchange. We did the same with Valentines. There were Pumpkin Carvings, Chalice Lightings, Pageant filmings, and Canned Goods to hunt. Families received a Family Worship "kit" of scales, stones, a chalice light, and happy and sad faces so that they could enact the rituals of worship at home. Families also received packets for each child, with a message from me and materials to be used. We did likewise with some of our prayer shawl knitters and the Harvest the Power recipients. In the absence of physical proximity, these were expressions of care.

Middle School Programs: As noted in last year's report, the 2020 Our Whole Lives class did not complete the program. I wrote a summary of each of the last workshops that the group missed (there were five). Each family received a letter, the summaries, and the resource book we give to all who complete the course. For many very good reasons, OWL is not offered virtually, so the course did not run in 2020-2021, and although we are making plans to run it next year, a lot depends on vaccination status of kids and what the guidance says about this fall when we get there. The backup plan is to begin in January if an October start date is not safely possible.

I have also connected with the Cambridge congregation to see about collaborating to have a robust OWL group, since we've had significant attrition in the more recent program years. The decision to offer OWL in house or collaborate will be made by the time I depart.

In the late autumn responding to the desire to have some options for middle schoolers, I reached out to other congregations and ended up partnering with The First Unitarian Church of Chicago for a world religions program, "Crossing Paths". Since in recent years our efforts to offer a world religions program has struggled to match visits to other faith communities with participant availability, a virtual program has allowed us to "visit" many faith communities during our hour-long sessions. I recommend using some iteration of this going forward with interfaith/world religions Religious Education.

High School Programs: I was honored to be able to speak to four young people who were bridging into young adulthood in last May's WUSYG service. I have watched them grow up in this congregation and become our future. In the past 6 years, I have not been a regular presence at WUSYG, and this year. I visited the group only once – as an activism panelist for a discussion of change makers during Activist Camp in April. I am always on call as needed, to advise on first reflections and write references on college and job applications.

Growth and Learning programs: Despite the flurry of adjustment to online programs, Matthew Brownski completed facilitating Joseph Campbell's "Power of Myth" series virtually last June.

We had formed a Writer's Group last spring, and that group has continued through to the present. The group is loosely structured, with a check in, writing time, and check out. Judy Lipperman led the group last summer and Dan Hermes facilitated the group during the program year. The group has waxed and waned in attendance and continues to do so.

Phil Coonley, Liz Lintz and I planned and facilitated the UUA's 6 session leadership course, Harvest the Power. Heather participated when her schedule permitted. A 7th session on Racial Justice has been added.

With the Pastoral Care Associates, we offered two more End of Life workshops. The first, offered in June 2020, covered the nuts and bolts of evaluating, preparing for and communicating your wishes around hospitalization in the event of significant injury or illness.

The second, in early January, brought in geriatric consultant Kathy Kemp who shared her expertise in case management of decision making and resource access around elder care for self or loved ones.

Growth and Learning/Social Justice Outreach: In response to the murder of George Floyd in late May, myself, Beth Levin from Temple Shir Tikvah and Liora Norwich from Network for Social Justice offered a three-part program. This virtual program was to offer an alternative to those in the greater community who did not feel comfortable in large gatherings of public witness. Using the energy of the moment to engage the emotions, new understandings, and desire for change that arose following Mr. Floyd's death, we designed three sessions for June and July, "Hands, Head and Heart". Attendance ranged from 26-59 attendees at each of the sessions, participants and facilitators drawn from our communities.

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. I returned this year to a co-facilitator role with the NAMI caregiver support group.

With the PCA group, we offered a Third Tuesday coffee and zoom chat over the winter months, and although attendance was uneven, the gatherings were meaningful for those who joined in.

Pastoral care weaves through family worship with sharing of Joys and Cares every week. There are also the meetings or zoom calls that start off as one thing and turn into another kind of conversation. Attempts to offer parent/caregiver support conversations never took hold. Caregivers were tapped out with homeschooling and managing screen time.

In addition, Heather and I hosted an Election night watch party, a listening circle (post-election with the PCA's sharing hosting duties), a co-cooking Thanksgiving get together and one of two planned prayer shawl gatherings.

Worship: I led the annual Blessing of the Animals service in late August. Having a virtual service insured that we would finally be joined by cats!

This year the primary vehicle for family religious education was our worship services, the 10 AM Family Worship Service and the 10:30 service First Reflections.

Last spring an attempt to create a Friday night family worship service didn't take. Families preferred Sunday morning which we returned to this fall. I have led family worship since we returned last fall. From September 27th – through present I have led 29 Family Worship services.

I have led 21 first reflections since September 13th.

I offered a homily/reflection in two late fall worship services. In addition, I took responsibility for an online Holiday pageant, consisting of three vignettes narrated by Lee Barton, Linda Copeland and Sharon Grady and put together with 70 + hours of editing. As I note elsewhere, I have created a library

of animated resources - liturgical lessons for Family Worship and stories and messages from First Reflections which can be used in the future (since I do not appear in them)

Through the year, I attend weekly worship planning meetings, for planning and coordination.

Professional Development: Along with meeting in the Religious Educators MetroWest cluster on a monthly schedule, I meet twice a month with a peer group from Follen, Bedford and Arlington. I met virtually for a weekly spiritual Practices in Nature group throughout the year. I spent many hours learning to animate and edit, and as my projects outgrew each iteration of software, learning another matrix. I have attended public health webinars on Covid safety, Bystander Intervention (around violence toward Asian Americans), UUA sponsored online events as we increase our knowledge and capacity for virtual and (eventual) hybrid ministry.

Gratitude: 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 deep thought, humor, insight and dedication to their work. Mike and Joe, our sextons and the most essential of employees. Thomas and Jenny taking turns in the office, but always efficient, accommodating, and warm. Thank you to Evan Forcucci for being a great program assistant until Covid ended that role. More thanks to Ms. Juanita Simms for her loving and gentle presence on Sunday mornings.

Thank you, Naomi, for not only anchoring outdoor gatherings, but for reaching out to others, and leading the Religious Education Committee in the midst of other demands. Thanks to committee members Erin, Sarah, Karen, Lucille, and Ryan.

Thanks to John Russell for his wisdom, Karen Ericson, Mary MacIntosh, and Maria Shepherd for random and not so random acts of caring.

There are the smalls who have grown up, the smalls who are growing, youth who have gone through OWL, Faith in Action, served as Religious Education leaders, and emerged into young adulthood before my eyes. There are others who have knit and chatted, have planned and conspired, marched in the streets, or spoke up in other ways, cooked and served, volunteered, polished and served on many committees, leaders in all areas of congregational life. There are colleagues who have moved on, interns who have graduated, members who are no longer among the living, and friends and members who have left the Winchester Unitarian Society. All I have known well, or less well have informed my life and ministry. You number in the hundreds.

We've had a good run, and I will miss you. As I submit my final annual report, know that you are held, as always, in my heart.

Report of the Director of Youth Ministries
Sam Wilson

Goals for Youth Ministry in 2020/2021:

In September, I wrote the following as part of my Standing Committee report: “Honestly I think that 2020 deserves a unique set of goals, and for me, for this year, the goal is less to grow and more to maintain; to continue creating connections and community and space for these teens to be themselves and figure out what that means. And have fun together! That being said, I do also hope that we are able to continue creating a program that is dynamic enough that we are at least able to get a few 9th graders to join us, too. To make this growth possible, we all need to remain flexible and compassionate. My primary goals for this year are to:

- Create dynamic virtual programming
- Retain most youth and add some, especially 9th graders
- Ensure no one contracts coronavirus because of anything that we do
- Make space for emergent strategies in response to whatever happens in the world.”

I believe that we were fairly successful in terms of our primary goals for this year. Our “Care Packages” at the start of the year were particularly helpful in creating more fun activities for us to do on Zoom together, and, although our numbers on Zoom declined slowly through the year, we kept up our momentum with regular in-person meetings, culminating in our particularly successful “Young Activists Camp” in April. 22 youth attended our camp, and I’m particularly thrilled to share that 8 of those 22 were new WUSYGers, who have never even been inside the WUSYG room before!

Our secondary goals were to resume First Reflection (which we did once a month for most months), revisit tracking and follow-up practice with teens we haven’t seen in a while (which we at least did before our in-person meetings and big events; I believe this particularly helped us get better numbers at our March in-person meeting and subsequently our Camp. We still need a better way of reaching out to teens when we haven’t seen them in a while. I always find this a bit tricky because I do not want to pressure them to come or make them feel badly for not attending.) and our 3rd secondary goal was to continue finding meaningful ways to connect with parents, too. We had an opening zoom meeting for parents in the fall and set up times for them to meet with Haley and me (though few took us up on this offer). I believe that there is still room to grow in terms of this goal (while being mindful that we don’t want to get too close to the parents either as this would potentially jeopardize the teens’ trust in us).

Overview of Youth Ministry Programming:

- Summer: We had in-person outdoor events for WUSYG on Sundays from 7/5 – 8/30. These went well though were relatively poorly attended, with an average of 8 teens each week. It was also difficult to advance some of our normal goals (developing further levels of trust and comfort with each other; having deeper convos, etc) with a cohort that never felt like the “whole group.” That being said, I do think that it was really important and meaningful for several of the teens who did attend, especially during this particularly complicated and stressful time. It also felt

successful in terms of safety and finding unique ways to have fun and build community together while adhering to our guidelines.

- September: We returned to Zoom meetings on Sept. 20th, starting a bit later than usual to coincide with delayed school opening. We also had a meeting with parents on 9/20 on Zoom. After our 1st meeting, we delivered “care bags” to 28 youth, which had various items for us to all use together during upcoming Zoom meetings through January. We had an average of 20 teens for the 1st month of our “Zoomsyg” meetings, which included fun things like “Personal(ity) Pizza Night,” “Zen-doodling w/ Glow in the Dark Paint, & Homemade Slime.”
- October: In October, we kept using items from the bags for some fun Zoomsyg meetings, with an average of 17 youth per meeting. We also had an in-person outdoor meeting to do pumpkin carving together, with 23 teens attending. We also worked with WUSYG alums to set up a haunted house on the property, which led to the addition of some new WUSYGers, too, who were originally recruited to help with the haunted house but then decided to join our group.
- November: We continued having Zoomsyg meetings most weeks, with an average of 17 youth attending, while still using stuff from our Care Package (highlight this month was using the cookie mix and decorations we sent them to make “Genderbread Cookies.”) We also had one in-person outdoor meeting where we tried to bring back some favorite activities from the Fall Retreat that we would normally have been doing around that time.
- December: We had 3 Zoomsyg meetings in December before a couple weeks off for break. Average youth attendance was still 17. We put our in-person meetings on hiatus because of the weather as well as the new rising numbers of Covid.
- January and February: In January and February we definitely noticed some more significant Zoom fatigue, with our numbers closer to 13 youth per Zoomsyg meeting, but we tried to keep the energy up with a variety of fun meetings.
- March: We continued meeting on Zoom for most of March and were also able to meet up again in-person for an outdoor meeting, with 18 teens attending. We had a really nice time together outdoors and “making someone’s day!” around town.
- April: The highlight of April was our 3-day “Young Activists Camp” in lieu of a service trip. The camp included 4 different modes of social action (education, service, public witness & advocacy) and focused on 3 different justice issues (environmental justice, racial justice & LGBTQIA rights). We were thrilled to have 22 youth join us for Camp, which was mostly on the WUS property, from 11 AM until 8 PM each night. Day 1 included a Horn Pond clean-up with Rev. Heather, Day 2 included an Activist Panel (with Rebecca, one of our own youth, and a friend of mine) followed by a Black Lives Matter public witness on the corner, and Day 3 was “WUSYG Pride,” an affirming space for our LGBTQIA teens to have fun together (plus spend some time contacting representatives around the country about impending anti-trans legislation). We also got our own sweatshirts, did spiritual practices in the morning, worship and games at night, and lots of other things to make the experience feel like a combination of a camp and a typical WUSYG service trip.
- May: next month, we will have Youth Sunday, per usual, and otherwise meet outdoors in-person each week, culminating with a goodbye party for Haley / end-of-year celebration on June 6th.

Other DYM Duties

- Met with YAC regularly through the summer and monthly during the school year.
- Attended weekly staff meetings and relevant worship planning meetings.
- Attended monthly meetings with Heather.
- Attended monthly meetings with Heather and Rebecca.
- Supervised Haley and met with her regularly.
- Put content in Highlights, weekly, plus continued updates via our 2 Instagrams, 1 public Snapchat, my professional Facebook account (and private Facebook group for WUSYG parents) and a new Discord Server to communicate directly with our teens.
- Provided ongoing pastoral support to current teens and parents as well as some recent alums.
- Served on the Sanctuary Taskforce, the DRE Search Team and the ADYM Search Team.
- Participated in various parts of the RE Visioning Team's process.
- Initiated some programming for "Emerging Adults" and "Young Adults"
- Led efforts to reorganize the WUSYG room and move things into the "dungeon"
- Coordinated WUSYG's involvement in monthly 1st reflections
- Led the service in January and participated in some other services throughout the year
- Tried to find places where we could do service during April vacation week
- Created/coordinated all of the programming for our Young Activist's Camp
- By the end of the program year, will have coordinated another virtual Youth Sunday and other end-of-year programming.

Professional Development Including Other Work for the Larger UU Faith

- Attended several Virtual Youth Ministry webinars/zooms/panels by the UUA and the Yale Youth Ministry Institute throughout the year.
- Served on the UU Service Committee's (UUSC) new "Congregational Engagement Advisory Team"
- Participated as a member of UUSC's cohort of "Activist Faith Leaders"
- Led workshops for the UU College of Social Justice
- Created content for the UUA's new Coming of Age curriculum
- Served on the Nominating Committee for the Liberal Religious Educator's Association (LREDA)
- Served on the UUA General Assembly 2021 Worship Arts Team
- Led workshops on Virtual Youth Ministry for the UUA
- Consulted for a few different UU youth groups
- Led "Social Justice Sundays" for Middle Schoolers at 1st Parish Northfield
- Led monthly programs in the spring for Needham UU Middle schoolers in the morning and their youth group in the evening
- Created content with Pacific Western Region UU Camp staff for "CampBox: Let's UUnpack This!" a "box subscription" service for UU middle and high school youth groups for the summer
- Regularly read and participate in various online spaces for UU religious educators

I continue to be grateful to be a part of this wonderful community, and, despite the unique challenges that this year brought, I remain grateful for all of the wonder and joy that I found in reimagining creative, fun, and safe ways to do youth ministry and faith development during the pandemic. I am so

lucky to have such a wonderful group of kids to work with, and I also really appreciate all of the support from other members of the staff, Standing Committee, and YAC. I'm excited to see what next year brings in my 8th year here as the DYM.

With love,
Sam

Report of the Administrator
Thomas Slack

There are some people referring to 2020 as “the lost year” due to the coronavirus pandemic and the forced isolation we have all experienced. However, the administrative/building staff at the Winchester Unitarian Society have been doing the best we can to keep things running smoothly during these challenging times. Without missing a beat Joe, Mike B. and Mike D., Jenny, and I transitioned our approach to handling our responsibilities to make the most efficient use of our time. Efforts have been made in coordination with our colleagues in other ministries of the society and some of the various committees so that community and connection can remain despite the distance, and improvements to the building and grounds can be completed for when we can gather together once again.

As vaccinations increase and we approach a new sense of normalcy there seems to be a buzz about a return to in person gatherings and all that comes with it. Although it is difficult for me to remember how things were in the office/building pre-pandemic, having spent the majority of my two years with WUS practicing pandemic office ministry, I am confident that we will make the transition “back to normal” with the same ease.

Please accept the following report of projects I've worked on as my Administrator's Annual Report for my second church year with the Winchester Unitarian Society. Also remember that these accomplishments are a combined effort by the administrative/building staff – 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

- **Building Security.** James Pidacks oversaw a security grant project which included the installation of several security cameras, improvements to locks, and the addition of two Ring doorbells (as well as the repurposing of a third) to assist staff with the monitoring the building and grounds at WUS. The office staff procured two tablets for the office that have a Ring app on them to know who is coming and going from the building. These tablets help us to continue to provide a welcoming environment while maintaining a secure building.
- **Roof Repairs.** Also during the summer of 2020 there were two sections of roof that got repaired by Maillet Construction – one by the Candle Room and the other by the Main Street foyer.

Maillet Construction will be returning in the summer of 2021 to take care of two other sections of roof – one over the Parlor and another in the RE Wing of the building.

- **Going Through Changes.** Certain aspects of office operations changed during the pandemic. We went from having a printed Order of Service (OOS) to one that was uploaded to the website so it could be downloaded by congregants. Then the OOS was reimagined as worship slides that were incorporated into the worship service itself. With worship services being online and getting recorded each week, they needed to be downloaded from Zoom and uploaded to YouTube and linked to the For Members & Friends page of the website. A YouTube channel for the Winchester Unitarian Society was created with mostly “unlisted” videos of worship services but also with several “public” animation videos created by Rebecca Kelley-Morgan.
- **Building Improvements.** The sextons continue to keep the building looking great and presentable despite the decreased number of visitors to the building. Supplies stay stocked and facilities functioning. During the pandemic our hardworking sextons have also saw to various improvements to the building while working with Chuck & Julie Khuen of the Building & Grounds Committee. Storage areas have been cleared out and reorganized, many sections of the church have been given new coats of paint or polyurethane, among other things. The snow blower was repaired and an electric leaf blower was donated to WUS.
- **Committee Support.** Provided administrative support to various committees who may have needed letters and other documents printed and dispersed to congregants. Some more detailed information for specific committees can be found below.
 - **Zoom Zoom Zoom.** Scheduled the majority of committee meetings in the two Zoom accounts WUS has. Helped individuals to troubleshoot issues they were having using the Zoom platform.
 - **Social Action & Outreach.** Assisted with aspects of the Thanksgiving Basket drive. Processed grant payments last summer and provided STP-history reports for determining grant awards for this year.
 - **Auction Team and Blessed Bricks Team.** Assisted with the handling of donations and bookkeeping portions of these two successful fundraising campaigns.
 - **Music Committee.** Provided assistance with getting Concert Series information up on the website and in Highlights. Assisted with the processing of donations by sponsors and at-the-door contributors.
 - **Green Sanctuary Committee.** Helped with scheduling their Zoom event on climate change and getting information for it on the website. Assisted with the gathering of information for the Environmental Stewardship Assessment completed by Interfaith Power & Light.
 - **Membership Committee.** Helped with the ordering and/or acquisition of lawn banners, thank you cards, and Bring-A-Friend Sunday post cards.
 - **Pledge Team.** 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 (5.6.2020), there have been 104 households pledged for a total amount pledged of \$329,490.
 - **Pandemic Planning Task Force.** Served as the staff liaison to this team whose focus was the safe operation of building/ground activities during the pandemic and the possible

pathways to reopening. I provided their guidelines to groups interested in meeting on society grounds and collected sign-in sheets from these groups for the purposes of contact tracing (if needed).

- **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 below. There hasn't been a lot of renters due to the building being pretty much closed for most of the church year. We even lost the Winchester School of Chinese Culture (WSCC) due to the pandemic. Although they are planning to return this fall.
 - **Rentals.** There have not been many rentals due to the pandemic. We had a piano school use the Sanctuary to do recording sessions rather than a recital. There are two potential renters for this summer – a STEM camp for youth to teach them about programming and game design, and a community theater camp.
 - **Nardone Electric.** After the great work they did with the security cameras system, we have been using Nardone Electric as our go-to electrician. They even inspect our fire alarms in collaboration with our new sprinkler inspection company, Lynco Fire Protection.
 - **Waltham Pest Services.** There has been an increase in mouse activity in the building but this organization has been helpful with suggestions to deal with the problem and things are under control.
 - **City Elevator.** This organization shows up every other month to make sure the elevator is functioning properly and we were able to pass this year's inspection with no issues.
 - **Boiler.** We had an inspection done by New England SteamWorks which went well, but there is a possibility of changing to LC Anderson who were hired for an HVAC project by Chuck K. and the Building Committee.
 - **Plumbers.** There has not been a lot of plumbing jobs to be done this year. JJ Loftus came once or twice. Joe (the AM sexton) was able to fix a few small plumbing issues. We also started working with a small-jobs plumber, Calabro Plumbing, who is located here in Winchester.

Finance & HR

- **Bookkeeping and Payroll.** Jenny continues to be the primary person working on bookkeeping and payroll. She continues to increase her expertise with 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.
 - Once again, she will be training me (via Zoom) to do all of these tasks, so I can carry on this work while she is away for the summer.
- **HR Changes.** There were no Teen RE Aides this year due to no in person RE programs. The soloists signed Letters of Agreement becoming employees of WUS instead of independent

contractors. A local high school student, James Shiang, was hired as an independent contractor to provide tech support for Sunday worship services as a Video Coordinator. Our payroll company, Fox Payroll, became part of a larger organization, Execupay, which resulted in a change of the representative we submit our payroll reports to.

Communications & Outreach

- **Ongoing Communications.** The office continues to produce publications for the congregation. These come in the form of the weekly Highlights newsletter and Weekend Worship Announcement, the quarterly Mystic Messenger newsletter, and the All-Church Email Blasts for various programs, events, and announcements. All website updates; including Services, Calendar, Events, etc.; and Zoom meeting scheduling is taken care of by the administrative staff.
- **My First Sermon.** Although not an official part of my job description, I gave my first ever sermon for the Veterans Day worship service. It was a great experience that allowed me to strengthen my bond and connection with the members of this congregation.
- **Community Assistance.** Jenny and I continue to coordinate with community members in need who stop by the building for Stop & Shop gift cards. There was also a period of a month or two where we were making the deliveries of congregant food donations to the Council of Social Concern. When Julie K., Rebecca K-M., and Rev. Heather made masks for people the office staff coordinated pickups and deliveries for them.

Looking Forward

Big Projects. There are a few larger projects that I continue to work on as I can find the time for them. These are the “Book of Everything” which is meant to serve as a guide for folks who may step in to help out in the office when Jenny and/or I are not around. It will have a list of the office’s responsibilities throughout the calendar year and detailed instructions to complete the tasks associated with these responsibilities. It will also have references for important vendors and organizations we work with regularly. I am also working on introducing the congregation to the Breeze platform so that members will have access to their pledge and giving information. People will also be able to access the contact information of other congregants like an online member directory. Another big project is the formation of a Marketing & Communications Team that will look at improving Highlights and the website, as well as how to communicate with the congregation and broader community regarding what is going on at WUS and what we have to offer. Eventually, the M&CT will also look at how to strengthen WUS presence on social media.

Gratitude

As my second church year comes to an end I am grateful to be part of this amazing community. There are several special folks who I am particularly thankful for as they continue to assist me as I develop in my role here at WUS – Judy Murray and Sue Kiewra, James Pidacks, Chuck Khuen, Kathy Richardson, and Rev. Heather Janules. I appreciate the bonding with and support of my fellow staff members and all of the work we do together. I am thankful for interactions, although limited due to the pandemic, with every one of the members of Winchester Unitarian Society – especially those of you who have

stopped by the building here and there throughout this year. I hope we all are able to see each other in person again soon.

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

Staff Covenant

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 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.

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.

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.

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.

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 strive to promote a collective ethic of shared agency, ministry and call.

In this pandemic time, we also

- Continue tolerance for risk while also accommodating others with individual needs
- Adopt an ethos of abundant generosity with one another in this stressful time

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

FINANCIAL REPORTS

Report of the Co-Treasurers

Gratitudes

Thank you to Jenny Goh for so capably and graciously performing the role of bookkeeper and handling the many methods used to make donations this pandemic year.

Thank you to Thomas Slack for being an all-around amazing church administrator and for overseeing financial administrative matters.

Thank you to the Trustees of Permanent Funds (Amy Hunter Maguire, Jennifer Dougherty, Kathryn Maffei) for managing our church endowments with a focus on environmentally and socially responsible investing.

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

Thank you to Brad Steele and Patrick Draine for joining the budget team in preparing the FY22 budget.

Thank you to staff members and congregants for your valued input during our annual budget process.

Thank you to Julie Khuen and Marilyn Mullane along with their terrific Auction Team for generating over \$32,000 in fundraising income.

Thank you to John Kramer, Music Committee organizers, and sponsors of our all-online concert series.

Thank you to Frank Virnelli whose donation in memory of his wife Judy and her love of gardening will beautify the grounds on the Mystic Valley Parkway side of the church.

Thank you to our "retired" Pastoral Care Associates for additional contributions to the MVPkwy project.

Thank you to the Pastoral Care Associates team for organizing the Memorial Bricks campaign.

Thank you to Mark and Maria Shepherd for funding COVID-related improvements to the HVAC system that will allow enhanced air flow throughout the building.

Thank you to the anonymous donor family for funding an ADA-compliant restroom on the Metcalf Hall level of the building.

Thank you to our partners at the Needham Bank for guiding us through the Payroll Protection Plan loan application and forgiveness processes.

Thank you to Kathy Richardson and Pete Baldwin on the Personnel Committee for guidance on compliance with staff compensation and insurance guidelines.

Thank you to our donors, pledgers, in-kind contributors, planned givers and all who share their financial 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 during this very odd and challenging year of the COVID-19 pandemic.

On the following pages, we are providing:

- Prior Year Report - September 1, 2019 through August 31, 2020 - actuals versus budget for FY20.
- Projection for Current Year - beginning September 1, 2020 and ending on August 31, 2021 – estimated FY21 actuals versus budget. Projections are based on actuals through March 31st and our best estimates for the coming months.
- Budget Proposal for Next Year - September 1, 2021 - August 31, 2022 - approved for FY22 by the Standing Committee at its meeting on April 21, 2021, for consideration by vote of membership at the 2021 Annual Meeting.
- Multi-year detail sheet for ease of comparison of actuals versus budget for FY20; actuals versus budget for FY21 through March 31st with projections through August 31st; and proposed budget for FY22.
- Balance sheet report showing accounts and fund balances on 8/31/2019, 8/31/2020, and 3/31/2021.
- Funds Activity Report from 8/31/2020 through 3/31/2021.

It has been a privilege to serve our WUS faith community as Co-Treasurers these last three years.
Respectfully submitted, Sue Kiewra and Judy Murray

Prior Year Report for FY20 (September 1, 2019 - August 31, 2020)

Operations for fiscal year September 1, 2019 through August 31, 2020 closed with a net operating deficit of \$8,335.32 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 \$373,833.03 on August 31st.

The operating deficit of \$8,335.32 was amazingly close to the budgeted deficit of \$8,788.38 although individual budget lines were under or over budget as follows:

Income:

- Contributions from individuals (current year pledge, prior year late pledge payments, non-pledge contributions, Share the Plate, and Sunday collection) were just \$58 off budget. Thank you to all whose generous fiscal support keeps our faith community strong.
- Investment returns exceeded budget by \$349 due mostly to opening money market accounts with better interest rates.
- Rental income from the Chinese After-School program exceeded budget due to renegotiation of its lease. Other building rental income was under budget by \$4,590 due to the COVID shutdown of the building.
- The auction fundraiser which was estimated to net \$25,000 was not held. Alternative fundraising efforts (Rev. Heather's soap sales, donations for COVID masks, the WUSYG spring fundraiser, and two benefit concerts by John Kramer) netted \$4,505. We are very grateful to those who organized these events.

Expenses:

- WUS made and kept a commitment to retain all full-time and part-time staff at pre-pandemic compensation levels. Total staff costs were under budget by \$9,010 due mostly to reduced use of professional expenses from cancellation of conferences and classes because of COVID. We are grateful to Rev. Heather Janules for contributing to WUS the unused portion of professional expenses that are part of her total compensation package. Another factor was not hiring a Faith in Action teacher due to lack of registrants for the program.
- Building & Grounds expenses were under budget by \$14,987 due to a light snow year and reduced maintenance costs during COVID shutdown.
- Non-building operations expenses were over budget by \$1,238 due mostly to increases in liability and workers compensation insurance rates.
- Programs and committees underspent budget by \$1,732.
- Grants overseen by the Social Action and Outreach Committee via our Share the Plate offerings and commitment of a portion of operational expenses totaled \$38,295 or 5.7% of total expenses.

Other Income and Expenses:

The Standing Committee approved the following motion at its meeting on Wednesday, October 7, 2020 resulting in a bottom line net income of \$0.

Motion: To close out WUS FY20 financial operations with adjustments to Capital Reserves funds on August 31, 2020, as follows:

1. As budgeted, allocate \$1,000 to the Project Escrow fund.
2. As budgeted, allocate \$8,000 to the Sabbatical Escrow fund.
3. Allocate \$6,336.97 to the Stabilization fund (since we saved money on snow removal; this will round out the balance to \$10,000 in the Stabilization fund for use in future years of heavy snowfall).
4. Allocate \$8,000 to the Building Escrow fund (since we saved money on building maintenance during COVID shutdown).
5. Apply \$14,919.18 from the Fundraising Escrow fund (to make up for not having an auction fundraiser which was budgeted to generate \$25,000 in income).
6. Apply \$16,753.11 from Undesignated Reserves to cover the operating deficit and allocations for future expenses (Project Escrow, Stabilization, Sabbatical Escrow, and Building Escrow).
7. Transfer \$278.05 in voided uncashed checks older than one year to Undesignated Reserves.

Changes to Capital Reserves on Balance Sheet:

Capital Reserves	August 31, 2019 balance	Aug 31, 2020 balance after motion was approved
Undesignated	\$71,593	\$55,118
Project Escrow	10,350	11,350
Stabilization	3,663	10,000
Sabbatical Escrow	35,917	43,917
Fundraising Escrow	14,919	0
Building Escrow	0	8,000
Total Reserves	\$136,442	\$128,385

Info on the Payroll Protection Plan loan from the US Small Business Association:

During the early days of the COVID pandemic lockdown with the slump in US financial markets, WUS deemed it prudent to apply for a Payroll Protection Program (PPP) loan of \$89,500 from the US Small Business Association (SBA) which was granted on May 5, 2020 via Needham Bank. Funds were used to pay staff salaries totaling \$94,667 during the period of May 5 through July 16. Subsequent legislation allowed WUS to submit an application in mid-August to the Needham Bank for forgiveness of the PPP loan. The bank reviewed it and passed it up the chain to the SBA which had 90 days to respond. As of August 31st, WUS was waiting for a response. Thus, as of FY20 year-end, the loan remained a liability on the church balance sheet. On October 15, the SBA approved loan forgiveness. This enables WUS to recognize \$89,500 as a PPP Grant under Other Income in FY21. The PPP funding has allowed WUS to retain staff compensation at pre-pandemic levels despite hits to pledge income, fundraising, building lease income and rentals which continued to affect WUS as the fiscal year 20-21 began.

Current Year Projection for FY21 (September 1, 2020 - August 31, 2021) based on March 31, 2021 actuals

Before considering the PPP loan forgiveness, a **net operating loss of \$47,615 is projected** for this fiscal year. This is \$46,929 LESS than – the budgeted loss of \$94,544 which the congregation approved by vote at the Special Annual Meeting in October 2020. With the forgiveness of the PPP loan of \$89,500 and a net allocation to Sabbatical Escrow of \$1,280, we are excited to be **projecting Net Income of \$40,605**.

Income – projecting \$30.4K more than budgeted

- We had larger than expected late payments/prior year pledges adding \$7,130 to income expected from Individuals.
- Income from investments is on track.
- By the time the budget was passed in October, we already knew that the Winchester School of Chinese Culture would not be renting from us for this program year and expected other rentals to be below average, so no surprises in building use from our budget.
- The biggest single source of unexpected but very welcome income was the HUGELY SUCCESSFUL AUCTION!!! Thanks to an amazing team and great participation from all, we raised \$32,871 from fundraising. Close to \$23,000 MORE than budgeted!!!!
- We are hopeful that the continued success of John Kramer and the Music Committee in providing joyful concerts will be as successful as expected and have made no changes to the projected income of \$8,000 from the concert series.

Expenses – projecting \$16.5K less than budgeted

- Staff compensation represents over 70% of church expenses. While there were small increases in benefit costs, we spent less on sabbatical substitutes, hired no teen aides or RE assistant, and so far, have not hired outside musicians saving \$7,300 in compensation overall.
- Under Building & Grounds, we saw savings of \$2,290 in snow removal and \$5,000 in maintenance.
- Office operations are projected to be about \$2,000 under budget with less copying and marketing.
- Several committees have not utilized the funds they were allocated, saving over \$4,000, but the chimes needed unanticipated maintenance, \$4,990 of which was expensed on the Chimes Playing and Maintenance line. We continue to benefit from Patrick Draine’s generous donation of his professional services to tune the church’s pianos free of charge.

These variations from budget, \$30.41K more income and \$16.5 less in expenses, when added to the Zero/Flat budget passed in October, should bring us to **projected net income of \$40,605**, despite an operating loss of \$47.6K before taking into account the PPP funds for the fiscal year ending August 31, 2021. While any surplus at the end of the fiscal year will be allocated to reserves by a vote of the standing committee, allocating most of the Auction excess to our Fundraising Escrow and leaving the remainder in Undesignated reserves will leave us in very good shape moving into next year, with total reserves of \$170K.

Capital Reserves	Aug 31, 2020	Projected for Aug 31, 2020
Undesignated	\$55,118	\$75,723
Project Escrow	11,350	11,350
Stabilization	10,000	10,000
Sabbatical Escrow	43,917	45,197
Fundraising Escrow	0	20,000
Building Carry-Forward	8,000	8,000
Total Reserves	\$128,385	\$170,270

Standing Committee Budget Proposal for FY22 (September 1, 2021 - August 31, 2022)

Your Standing Committee (SC) has prepared a preliminary budget for FY22 which begins Sept 1, 2021, and runs through August 31, 2022. 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 21st.

Income Highlights –

- Pledges are our most significant revenue source. Notable year-to-year trends: fewer members, fewer pledgers, but higher average per-pledge amounts.
- Endowment and trust disbursements are our second most significant source of revenue. Because of strong market returns as of March 31st, WUS Trustees of Permanent Funds estimate over \$12,000 more than last year in disbursements from restricted and unrestricted endowment funds.
- Building use is a distant but important third source of revenue from leases with the Winchester Cooperative Nursery School and the Winchester School of Chinese Culture as well as other rentals.
- Fundraising and the Concert Series are also significant revenue sources. As yet, we have no identified event or leadership for FY22 fundraising.

Expenses –

- Personnel costs (about 70% of annual church expenses)
 - staff compensations are within UUA guidelines for churches of similar size in the Boston metro area and follow MA state minimum wage laws
 - 0.5% cost of living adjustment (COLA) from January 2020 to January 2021 for the Boston metro area as published by the Bureau of Labor Statistics was applied
 - applied increases for health insurance (up 10% as of July 1), dental, life and LTD insurance
- Building/grounds, office operations, and program committee costs are based on the previous 3-years' averages.
- Our fair share dues to the UUA Annual Program Fund is increasing by 10% as we gradually approach the UUA request of 6.75% of annual expenses.
- Social Action Committee and Share the Plate grants have been calculated at 5% of budget.

For FY22, total proposed expenses of \$713,747 exceed proposed income of \$663,857 by \$49,890. The deficit will be made up by pulling \$25,000 from the Sabbatical Escrow Fund and \$24,890 from Undesignated Capital Reserves. Because we are projecting that FY21 will end with a \$40K surplus, our reserve funds are in great shape. The estimated balances in capital reserve funds at the end of FY22 are indicated in the table below:

Capital Reserves	Projected for Aug 31, 2021	Estimated Aug 31, 2022
Undesignated	\$75,723	\$50,833
Project Escrow	11,350	11,350
Stabilization	10,000	10,000
Sabbatical Escrow	45,197	20,197
Fundraising Escrow	20,000	20,000
Building Carry-Forward	8,000	8,000
Total Reserves	\$170,270	\$120,380

FY22 Proposed Budget for Sept 1, 2021 thru Aug 31, 2022
approved by Standing Committee on 4/21/2021

3 INCOME		Percentage of
4 INDIVIDUALS		Income or
		Expenses
5	FY22 Pledges	\$350,000 53%
6	Late FY21 pledge payments	\$8,000
7	Contributions (Sunday collection, mail-in)	\$23,000
8	Contributions (Share the Plate)	\$17,000
9	Equities transfer and online payment fees	(\$1,800)
10	TOTAL INDIVIDUALS	\$396,200 60%
11	INVESTMENTS AND ENDOWMENT DISBURSEMENTS	
12	Downs Trust	\$12,340
13	Meyer Trust	\$57,600
14	WUS Trustees Unrestricted Fund	\$105,423
15	WUS Trustees Restricted Funds (Building, Cook, Baldwins)	\$13,879
16	Interest (Checking and CDs)	\$2,500
17	TOTAL FROM TRUSTS and ENDOWMENTS	\$191,742 29%
18	BUILDING USE	
19	Rentals (Winchester Co-operative Nursery School, Winch. School of Chinese Culture)	\$50,915
20	Other (Single Events)	\$2,000
21	TOTAL BUILDING	\$52,915 8%
22	OTHER SOURCES	
23	Fund Raising Events	\$15,000
24	Concert Series	\$8,000
25	TOTAL OTHER	\$23,000 3%
26	TOTAL INCOME	\$663,857
27		
28	EXPENSES	
29	MINISTER AND STAFF	COLA 0.5%
30	Minister Wages and Benefits	\$137,106
31	Minister Professional Expenses	\$10,500
32	Sabbatical Minister, Summer Minister, Speakers	\$28,153
33	TOTAL MINISTERIAL	\$175,759 25%
34	Administrator Wages and Benefits	\$75,721
35	Administrator Professional Expenses	\$1,000
36	Admin Assistant Wages	\$24,419
37	Sextons Wages	\$40,930
38	TOTAL ADMINISTRATIVE	\$142,070 20%
39	DRE Wages and Benefits	\$44,368
40	DRE Professional Expenses	\$3,500
41	Teen Aides, Nursery	\$6,784
42	TOTAL RELIGIOUS EDUCATION	\$54,653 8%
43	Youth Director Wages and Benefits	\$53,958
44	Youth Director Professional Expenses	\$2,000
45	Assistant Youth Director Wages	\$8,138
46	TOTAL YOUTH	\$64,097 9%
47	Music Director Wages and Benefits	\$47,059
48	Music Director Professional Expenses	\$2,160
49	Children's Chorale Director Wages	\$3,354
50	Contract Musicians (Soloists, Section Leaders, Instrumentalists, Subs)	\$17,574
51	TOTAL MUSIC	\$70,147 10%
52	TOTAL MINISTER and STAFF	\$506,726 71%

53	BUILDING AND GROUNDS		
54	Snow Removal and Grounds Maintenance	\$17,600	
55	Building Maintenance	\$35,000	
56	Furnishings, Cleaning Supplies, Kitchen/Restroom Supplies	\$2,560	
57	Utilities - Heat, Electricity, Water/Sewer	\$29,840	
58		<hr/>	
	TOTAL BUILDING and GROUNDS	\$85,000	12%
59	OPERATIONS		
60	Financial (Insurance, Pledge Drive Expenses)	\$18,000	
61	Office (Phone, Internet, Copier, Equipment, Postage, Website)	\$18,100	
62	Staff Acknowledgements, Transitions	\$1,351	
63	Denominational Affairs (UUA Dues, Outside Org memberships)	\$33,580	
64		<hr/>	
	TOTAL OPERATIONS	\$71,031	10%
65	PROGRAMS AND COMMITTEES SUPPORT		
66	Chimes, Organ/piano maintenance, Choral music, RE supplies, OWL training, RE Special programs, Growth & Learning, WUSYG programming, Worship, Flowers, Candles, Fellowship, Hospitality, Membership, Grief & PCAs, Small Group Ministry, Leadership Development, Green Sanctuary, Social Action, Standing Committee, Special projects, Planned Giving	\$15,990	
67		<hr/>	
	TOTAL PROGRAMS	\$15,990	2%
68	SOCIAL OUTREACH GRANTS		
69	SOC Committee Grants	\$18,000	
70	SOC Share the Plate Grants	\$17,000	
71		<hr/>	
	TOTAL GRANTS	\$35,000	5%
72	TOTAL EXPENSES	\$713,747	
73	NET OPERATING INCOME (LOSS)	(\$49,890)	
74			
75	OTHER INCOME		
76	From Undesignated Capital Reserves	\$24,890	
77	From Sabbatical Escrow	\$25,000	
78		<hr/>	
	TOTAL OTHER INCOME	\$49,890	
79	OTHER EXPENSES		
80		<hr/>	
	TOTAL OTHER EXPENSES	\$0	
81	NET OTHER INCOME (LOSS)	\$49,890	
82			
83	ADJUSTED OPERATING INCOME (LOSS)	\$0	

FY20 Budget vs Actuals; FY21 Budget vs Actuals as of 3/31/21 with Projected Year-End; FY22 Proposed

	FY20 Budget Approved 5/19/2019	FY20 Actual 8/31/2020	FY21 Budget Approved 10/18/2020	FY21 Actual 3/31/21	FY21 Projected Year-End	FY22 Proposed Budget
3 INCOME						
4 Individuals						
5 Current Year Pledges	370,000	354,433	340,000	258,203	340,000	350,000
6 Prior Year Pledges (Late Payments)	5,100	9,453	12,600	19,730	19,730	8,000
7 Contributions - non-pledge	9,000	14,212	9,000	7,353	9,000	10,000
8 Sunday Collection - non-pledge	11,500	15,113	13,000	8,387	13,000	13,000
9 Sunday Collection - Share the Plate	15,000	17,674	15,000	11,278	15,000	17,000
10 Electronic Funds Fees	(1,350)	(1,693)	(1,800)	(1,386)	(1,800)	(1,800)
11 TOTAL INDIVIDUALS	409,250	409,192	387,800	303,566	394,930	396,200
12 % of Total Income	60%	62%	63%	65%	61%	60%
13 Investments						
14 Bank Interest	2,225	2,979	2,500	1,595	2,500	2,500
15 Downs Income	12,340	12,340	12,340	9,255	12,340	12,340
16 Meyer Income	57,673	57,600	57,600	33,600	57,600	57,600
17 Trustees PermFunds - Unrestricted	95,833	95,833	96,567	48,000	96,567	105,423
18 Trustees PermFunds - Building	794	802	716	716	716	956
19 Trustees PermFunds - Cook Funds	8,103	8,190	7,310	7,311	7,310	9,756
20 Trustees PermFunds - Baldwin Fund			2,373	2,372	2,373	3,167
21 Trustees PermFunds - Student Minister	13,111	12,683				
22 TOTAL INVESTMENTS	190,078	190,427	179,406	102,849	179,406	191,742
23 % of Total Income	28%	29%	29%	22%	28%	29%
24 Building Use						
25 Winchester Coop Nursery School	29,400	29,400	30,870	30,870	30,870	32,415
26 Winchester School of Chinese Culture	16,500	17,600				18,500
27 Other Building Use	8,000	3,410	2,000	450	2,400	2,000
28 TOTAL BUILDING USE	53,900	50,410	32,870	31,320	33,270	52,915
29 % of Total Income	8%	8%	5%	7%	5%	8%
30 Other Sources						
31 Fundraising	25,000	4,505	10,000	32,407	32,872	15,000
32 Misc Income (WUSYG summer camp in FY20)		1,330				
33 Concert Series	8,000	9,000	8,000		8,000	8,000
34 TOTAL OTHER SOURCES	33,000.00	14,834.89	18,000.00	32,406.53	40,871.53	23,000.00
35 % of Total Income	5%	2%	3%	7%	6%	3%
36 TOTAL INCOME	\$686,228	\$664,864	\$618,076	\$470,142	\$648,478	\$663,857
37 EXPENSES						
38 Minister and Staff						
39 Minister Wages and Benefits	131,385	131,638	135,244	76,696	137,302	137,106
40 Minister Professional Expenses	10,210	7,811	10,400	2,539	10,400	10,500
41 Substitute Staff during Sabbatical Student Minister, Summer Minister,			10,000	3,720	3,720	25,000
42 Speakers	16,264	16,246	3,153	365	3,153	3,153
43 Total Ministerial	157,859	155,695	158,797	83,320	154,575	175,759
44 % of Total Minister and Staff	31%	31%	31%	30%	30%	35%
45 % of Total Expenses	23%	23%	22%	22%	22%	25%
46 Administrator Wages and Benefits	62,765	62,572	69,818	39,202	72,350	75,721
47 Administrator Professional Expenses	1,000	175	1,000	195	1,000	1,000
48 Administrative Assistant Wages	20,285	24,048	22,176	13,750	22,176	24,419

	FY20 Budget Approved 5/19/2019	FY20 Actual 8/31/2020	FY21 Budget Approved 10/18/2020	FY21 Actual 3/31/21	FY21 Projected Year-End	FY22 Proposed Budget
50 Sextons Wages	39,499	40,110	40,360	23,192	40,360	40,930
51 Total Administration	123,549	126,905	133,354	76,338	135,886	142,070
52 % of Total Minister and Staff	24%	26%	26%	27%	27%	28%
53 % of Total Expenses	18%	19%	19%	20%	20%	20%
54 DLREWages and Benefits	81,594	82,571	84,321	50,308	84,321	44,368
55 DLRE Professional Expenses	4,500	2,407	4,500	816	4,500	3,500
56 RE Asst, Teachers, Faith in Action, Nursery	11,947	6,477	5,069	620	1,000	6,784
57 Total Religious Education	98,040	91,455	93,890	51,744	89,821	54,653
58 % of Total Minister and Staff	19%	18%	18%	18%	18%	11%
59 % of Total Expenses	14%	14%	13%	14%	13%	8%
60 Youth Director Wages and Benefits	49,206	50,073	50,269	27,558	50,269	53,958
61 Youth Director Professional Expenses	2,000	1,677	2,000	663	2,000	2,000
62 Youth Assistant Wages	8,768	8,045	8,915	3,539	8,915	8,138
63 Total Youth	59,973	59,795	61,183	31,760	61,183	64,097
64 % of Total Minister and Staff	12%	12%	12%	11%	12%	13%
65 % of Total Expenses	9%	9%	9%	8%	9%	9%
66 Music Director Wages and Benefits	45,769	45,838	46,776	26,895	46,776	47,059
67 Music Director Professional Expenses	2,100	369	2,150	2,150	2,150	2,160
68 Children's Chorale Director Wages Soloists, Section Leaders, Instrumentalists,	3,075	2,970	3,100	2,172	3,100	3,354
69 Subs	15,150	13,480	16,156	9,423	14,656	17,574
70 Total Music	66,094	62,657	68,183	38,490	66,683	70,147
71 % of Total Minister and Staff	13%	13%	13%	14%	13%	14%
72 % of Total Expenses	10%	9%	10%	10%	10%	10%
73 TOTAL MINISTER AND STAFF	505,517	496,507	515,407	281,652	508,147	506,726
74 % of Total Expenses	73%	74%	72%	74%	73%	71%
75 Building & Grounds						
76 Snow Removal and Grounds Maintenance	16,000	9,835	17,600	12,890	15,310	17,600
77 Building Maintenance Furnishings, Cleaning/Kitchen/Restroom	36,000	27,325	35,000	8,153	30,000	35,000
78 Supplies	2,200	1,406	2,560	1,422	2,560	2,560
79 Utilities - Heat, Electricity, Water/Sewer	25,500	26,148	29,840	17,772	29,840	29,840
80 TOTAL BUILDING & GROUNDS	79,700	64,713	85,000	40,236	77,710	85,000
81 % of Total Expenses	11%	10%	12%	11%	11%	12%
82 Operations						
83 Financial - Insurance, Pledge Drive expenses	15,850	17,578	18,000	9,013	18,000	18,000
84 Office - Phone, Internet, Copier, Equipment, Postage, Website	18,000	18,018	18,100	8,894	16,100	18,100
85 Staff Meetings, Acknowledgements, Transitions	1,500	1,242	1,300	938	1,038	1,351
86 UUA Annual Program Fund (UUA dues) Partner Church, UU Urban Ministry	27,339	27,339	30,073	22,555	30,073	33,080
87 membership	500	250	500		500	500
88 TOTAL OPERATIONS	63,189	64,427	67,973	41,400	65,711	71,031
89 % of Total Expenses	9%	10%	10%	11%	9%	10%
90 Programs & Committees						
91 Chimes Playing and Maintenance	500	2,296	500	4,990	4,990	500
92 Organ & Piano Maintenance	800	0	800	0	0	800
93 Choral Music & Supplies	700	271	700	0	0	700
94 RE Supplies & Curriculum	1,500	1,646	1,500	475	1,000	1,500
95 OWL Teacher Training	0	0	0	0	0	400
96 RE Special Programs	250	250	250	84	100	250

		FY20 Budget Approved 5/19/2019	FY20 Actual 8/31/2020	FY21 Budget Approved 10/18/2020	FY21 Actual 3/31/21	FY21 Projected Year-End	FY22 Proposed Budget
97	Growth & Learning	100	(27)	100	0	0	100
98	WUSYG Supplies & Projects	2,500	1,694	2,500	1,230	2,500	2,500
99	Worship & Flowers & Candles	500	263	750	531	750	4,500
100	Fellowship	200	215	200	0	0	200
101	Hospitality	1,400	663	1,500	0	0	1,500
102	Membership	1,200	1,308	1,200	1,321	1,609	1,800
103	Grief Group & PCAs	400	113	200	28	200	200
104	Small Group Ministry	100	0	100	0	0	100
105	Leadership Development	100	0	100	0	0	100
106	Green Sanctuary	100	202	200	0	200	200
107	Social Action Supplies	100	85	100	0	0	100
108	Standing Committee	220	85	220	175	175	220
109	SC Projects & Initiatives	220	195	220	0	0	220
110	SFC - Planned Giving	100	0	100	0	0	100
111	TOTAL PROGRAMS & COMMITTEES	10,990	9,258	11,240	8,833	11,524	15,990
112	% of Total Expenses	2%	1%	2%	2%	2%	2%
113	Grants to Outside Organizations						
114	Social Action Committee Grants	20,621	20,621	18,000		18,000	18,000
115	Share the Plate Grants	15,000	17,674	15,000	9,542	15,000	17,000
116	TOTAL GRANTS TO OUTSIDE ORGANIZATIONS	35,621	38,295	33,000	9,542	33,000	35,000
117	% of Total Expenses	5%	5.7%	5%	3%	5%	5%
118	TOTAL EXPENSES	\$695,016	\$673,200	\$712,620	\$381,662	\$696,093	\$713,747
119	NET OPERATING INCOME (LOSS)	(\$8,788)	(\$8,335)	(\$94,544)	\$88,480	(\$47,615)	(\$49,890)
120							
121	OTHER INCOME						
122	from Undesignated Capital Reserves	26,455	16,753				24,890
123	from Fundraising Escrow		14,919				
124	from Building Escrow						
125	from Sabbatical Escrow			10,000		3,720	25,000
126	PPP Grant of \$89,500 after Loan Forgiveness			89,500	89,500	89,500	
127	TOTAL OTHER INCOME	\$26,455	\$31,672	\$99,500	\$89,500	\$93,220	\$49,890
128	OTHER EXPENSES						
129	to Fundraising Escrow	8,667		4,956			
130	to Project Escrow	1,000	1,000				
131	to Stabilization/Utilities Escrow		6,337				
132	to Building Escrow		8,000				
133	to Sabbatical Escrow	8,000	8,000			5,000	
134	TOTAL OTHER EXPENSES	\$17,667	\$23,337	\$4,956	\$0	\$5,000	\$0
135	NET OTHER INCOME	\$8,788	\$8,335	\$94,544	\$89,500	\$88,220	\$49,890
136	ADJUSTED OPERATING INCOME (LOSS)	(\$0)	(\$0)	\$0	\$177,980	\$40,605	\$0

Winchester Unitarian Society - Balance Sheet

	As of Mar 31, 2021	As of Aug 31, 2020	As of Aug 31, 2019
ASSETS			
Current Assets			
Bank Accounts			
1010 Winchester Savings Ops Checking	88,015.71	71,569.23	138,476.51
1015 Needham Bank Payroll Checking	26,755.98	5,896.41	0.00
1020 Winchester Savings CDs	86,737.97	85,854.30	84,253.50
1030 Needham Bank CD 1	0.00	0.00	50,182.54
1040 Needham Bank CD 2	62,227.61	62,017.68	61,155.39
1050 Winchester Savings MDF Checking	7,887.91	7,986.03	3,809.54
1060 Winchester Savings Money Market	270,816.26	120,391.63	0.00
1080 Needham Bank Money Market	187.61	20,117.75	0.00
Total Bank Accounts	\$ 572,629.05	\$ 373,833.03	\$ 337,877.48
Total Current Assets	\$ 572,629.05	\$ 373,833.03	\$ 337,877.48
TOTAL ASSETS	\$ 572,629.05	\$ 373,833.03	\$ 337,877.48
LIABILITIES AND EQUITY			
Liabilities			
Current Liabilities			
Other Current Liabilities			
3000 Operating Funds			
3010 Payroll Protection Plan Loan	0.00	89,500.00	0.00
3020 Capital Reserves			
3021 Undesignated Capital Reserves	55,117.72	55,117.72	71,592.78
3022 Project Escrow (Web, Marketing, Audit)	11,350.00	11,350.00	10,350.00
3023 Stabilization (Snow, Utilities, etc.)	10,000.00	10,000.00	3,663.03
3024 Sabbatical Escrow	43,917.01	43,917.01	35,917.01
3025 Fundraising Escrow	0.00	0.00	14,919.18
3026 Building Expense Carry-forward	8,000.00	8,000.00	0.00
Total 3020 Capital Reserves	\$ 128,384.73	\$ 128,384.73	\$ 136,442.00
3050 Prepaid Pledges	19,840.00	60,723.18	41,545.10
Total 3000 Operating Funds	\$ 148,224.73	\$ 278,607.91	\$ 177,987.10
3100 Building and Grounds			
3120 Michelson Room Redo	1,427.98	1,427.98	1,427.98
3130 Donald Ellis Fund	0.00	0.00	0.00
3140 from Stone Window Fund	845.39	845.39	845.39
3150 from Meditation Garden Fund	2,784.63	2,142.88	722.88
3160 Hardscape Upgrades Fund (Meyer)	6,692.57	7,102.57	17,327.28
3170 Building Security Enhancements	389.00	389.00	0.00
3180 Accessible Restroom	37,815.38	0.00	0.00
3190 Mystic Valley Pkwy Project	77,725.00	0.00	0.00
3191 HVAC project	9,284.00	0.00	0.00
Total 3100 Building and Grounds	\$ 136,963.95	\$ 11,907.82	\$ 20,323.53
3200 Flower Funds			
3210 Flower Fund	630.63	265.14	88.66
3220 from Dawn Kelley Bartlett Fund	2,019.74	932.39	1,465.29
Total 3200 Flower Funds	\$ 2,650.37	\$ 1,197.53	\$ 1,553.95
3300 Memorial Fund	9,464.00	3,720.00	2,500.00

	As of Mar 31, 2021	As of Aug 31, 2020	As of Aug 31, 2019
3400 Music Funds			
3450 Concert Series	11,807.41	2,246.41	1,753.67
3460 from Parkhurst Organ Fund	306.65	0.00	393.18
3470 from Sue Swap Fund	4,094.45	1,884.00	1,568.31
3480 Elora Trump Fund	766.05	766.05	766.05
3490 Harpsichord Fund	536.00	536.00	536.00
3491 Cerny/Thomas Fund	1,530.73	873.53	2,336.41
Total 3400 Music Funds	\$ 19,041.29	\$ 6,305.99	\$ 7,353.62
3500 Outreach Funds			
3510 Partner Church	0.00	2.00	600.00
3530 Share the Plate	285.60	285.60	0.00
3540 Reach Out	464.88	464.88	464.88
3550 Disaster Relief	50.34	50.34	50.34
3560 Woburn Council	0.00	20.00	20.00
Total 3500 Outreach Funds	\$ 800.82	\$ 822.82	\$ 1,135.22
3600 RE Funds			
3630 from Nash Nursery Fund	1,996.79	1,996.79	1,996.79
3640 Our Whole Lives - class balance	859.84	859.84	559.84
3650 Coming of Age & F8th in Action	466.07	466.07	466.07
Total 3600 RE Funds	\$ 3,322.70	\$ 3,322.70	\$ 3,022.70
3700 Youth Funds			
3710 WUSYG Service Project Fund	13,273.29	13,473.29	7,277.79
3720 Church School Youth Fund	209.17	188.57	165.46
3730 from Sandy Fries Youth Fund	780.91	780.91	780.91
Total 3700 Youth Funds	\$ 14,263.37	\$ 14,442.77	\$ 8,224.16
3800 Other Funds			
3805 SC Projects Fund (Baldwins)	46,064.84	46,064.84	101,851.68
3810 Equal Exchange	0.00	0.00	-34.62
3820 Pastoral Care Ministry	934.85	934.85	934.85
3840 from Student Minister Fund	0.00	0.00	800.97
3850 Green Sanctuary Carbon Offset	1,600.00	1,100.00	500.00
3870 Yoga Fund	2,055.33	1,245.33	420.33
3880 from Downs Fund	0.00	0.00	3,194.00
3890 Contra	1,374.44	(3,825.56)	4,022.40
3895 Minister Discretionary Fund	7,887.91	7,986.03	3,809.54
Total 3800 Other Funds	\$ 59,917.37	\$ 53,505.49	\$ 115,499.15
3900 Uncleared WSB Checks in ChWindows	0.00	0.00	278.05
Total Other Current Liabilities	\$ 394,648.60	\$ 373,833.03	\$ 337,877.48
Total Current Liabilities	\$ 394,648.60	\$ 373,833.03	\$ 337,877.48
Total Liabilities	\$ 394,648.60	\$ 373,833.03	\$ 337,877.48
Equity			
Opening Balance Equity	0.00	0.00	0.00
Retained Earnings	0.00	0.00	0.00
Net Income	177,980.45		
Total Equity	\$ 177,980.45	\$ 0.00	\$ 0.00
TOTAL LIABILITIES AND EQUITY	\$ 572,629.05	\$ 373,833.03	\$ 337,877.48

Winchester Unitarian Society - Winchester MA
Balance Sheet Funds Activity Report as of 03/31/2021

Account Number and Name	Balance 8/31/2020	Receipts	Disbursements	Balance 3/31/2021
3010 Payroll Protection Plan Loan	89,500.00		89,500.00	0.00
3021 Undesignated Capital Reserves	55,117.72			55,117.72
3022 Project Escrow	11,350.00			11,350.00
3023 Stabilization (Snow, Utilities)	10,000.00			10,000.00
3024 Sabbatical Escrow	43,917.01			43,917.01
3025 Fundraising Escrow	0.00			0.00
3026 Building Expense Carry-forward	8,000.00			8,000.00
3050 Prepaid Pledges	60,723.18	19,840.00	60,723.18	19,840.00
3120 Michelson Room Redo	1,427.98			1,427.98
3140 from Stone Window Fund	845.39			845.39
3150 from Meditation Garden Fund	2,142.88	641.75		2,784.63
3160 Hardscape Upgrades Fund	7,102.57		410.00	6,692.57
3170 Building Security Enhancements	389.00			389.00
3180 Accessible Restroom	0.00	50,000.00	12,184.62	37,815.38
3190 Mystic Valley Pkwy Project	0.00	104,575.00	26,850.00	77,725.00
3191 HVAC Project	0.00	10,000.00	716.00	9,284.00
3210 Flower Fund	265.14	449.45	83.96	630.63
3220 from Dawn Kelley Bartlett Fund	932.39	1,114.95	27.60	2,019.74
3300 Memorial Fund	3,720.00	5,744.00		9,464.00
3450 Concert Series	2,246.41	11,565.00	2,004.00	11,807.41
3460 from Parkhurst Organ Fund	0.00	306.65		306.65
3470 from Sue Swap Fund	1,884.00	2,210.45		4,094.45
3480 Elora Trump Fund	766.05			766.05
3490 Harpsichord Fund	536.00			536.00
3491 Cerny/Thomas Fund	873.53	657.20		1,530.73
3510 Partner Church	2.00	3,838.00	3,840.00	0.00
3530 Share the Plate	285.60			285.60
3540 Reach Out	464.88			464.88
3550 Disaster Relief	50.34			50.34
3560 Woburn Council	20.00		20.00	0.00
3630 from Nash Nursery Fund	1,996.79			1,996.79
3640 Our Whole Lives - class balance	859.84			859.84
3650 Coming of Age & F8th in Action	466.07			466.07
3710 WUSYG Service Project Fund	13,473.29		200.00	13,273.29
3720 Church School Youth Fund	188.57	20.60		209.17
3730 from Sandy Fries Youth Fund	780.91			780.91
3805 SC Projects Fund (Baldwins)	46,064.84			46,064.84
3820 Pastoral Care Ministry	934.85			934.85
3850 Green Sanctuary Carbon Offset	1,100.00	500.00		1,600.00
3870 Yoga Fund	1,245.33	810.00		2,055.33
3890 Contra	(3,825.56)	333,653.15	328,453.15	1,374.44
3895 Minister Discretionary Fund	7,986.03	2,295.00	2,393.12	7,887.91
TOTAL	\$ 373,833.03	\$ 548,221.20	\$ 527,405.63	\$ 394,648.60

WUS Trustees' Annual Report for the Winchester Unitarian Society Permanent Funds

March 31, 2020 - March 31, 2021

ESG Mandate

At the direction of the Congregation, the WUS Permanent Funds are invested exclusively in funds using ESG¹ factors in their investment selection process. As shown in the table below, the ESG blended benchmark performance of 43.88% outperformed the equivalent non-ESG blended benchmark performance of 43.12%.

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	42.44 %
	Restricted	40.48 %
Blended Benchmarks	ESG	43.88 %
	Non-ESG	43.12 %

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 Upcoming Church Fiscal Year
- D. Allocation to Each WUS 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 Instl
- Parnassus Mid-Cap
- I Shares MSCI KLD 400 Social ETF
- Calvert Small Cap Instl
- Pax Intl Sustainable Economy Instl
- Calvert Emerging Markets Equity Instl
- Calvert International Opportunities Instl
- TIAA-CREF Core Impact Bond Advsr
- Calvert Bond Instl
- Calvert Short Duration Income Instl
- Calvert Ultra-Short Duration Income Instl

¹ 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.

Additions to the WUS Permanent Funds

- **\$10,489 to the Restricted Funds**

The WUS is extremely grateful to our donors: Walter Swap, Larry Banks, Ellen Spencer, and the Music Committee (funding from the concert series).

\$ 1,000 to The Larry Banks Intern Ministry Fund

\$ 6,000 to The Sue Swap Fund, and

\$ 2,100 to The Meditation Garden

In addition, \$1,390 of unused intern funds were returned to their respective restricted accounts.

- **No contributions to the Unrestricted Funds**

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, **\$111,817** was distributed from all accounts comprising the WUS Permanent Funds during the Trustees' fiscal year ending March 31, 2021.

- **\$15,984 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 usually in October.
- **\$95,833 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%.

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 has served as our Fiduciary and has provided services 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 L. Maffei, Jennifer Dowling Dougherty, and Amy Hunter Maguire

WUS Trustees' Annual Report – Supplementary Information

March 31, 2020 – March 31, 2021

A. Blended Benchmark Components: Allocations & 1-Year Returns

Benchmark Components	WUS Portfolio Allocation 3/31/2021	1-year Annual Performance			
		ESG		Non-ESG	
US Large Cap Equity	45%	MSCI USA ESG SELECT	61.19%	S&P 500	56.35%
Fixed Income (US)	30%	Barclay's Aggregate*	0.71%	Barclay's Aggregate*	0.71%
International Equity	10%	MSCI EAFE ESG Leaders	44.04%	MSCI EAFE	44.56%
US Mid-Cap Equity	10%	MSCI Mid USA ESG Leaders	72.95%	S&P Mid	83.46%
US Small-Cap Equity	5%	MSCI Small USA ESG Leaders	88.73%	Russell 2000	94.85%
TOTAL	100%	ESG Blended Benchmark	43.88%	Non-ESG Blended Benchmark	43.12%

B. WUS Permanent Funds: Account Values

	Market Value 3/31/2020	Cash Flows during Fiscal Year		Adjusted Market Value as of 3/31/2020	Market Value 3/31/2021	1-Year Gain (Loss)	
		Inflows	Outflows			\$	%
Unrestricted Funds	\$1,841,168	\$0	\$95,833	\$1,745,335	\$2,486,002	\$740,667	42.44%
Restricted Funds	\$614,863	\$10,489	\$15,984	\$609,368	\$856,042	\$246,674	40.48%
Total	\$2,456,031	\$10,489	\$111,817	\$2,354,703	\$3,342,044	\$987,341	41.93%

C. WUS Unrestricted Account: Planned Distributions for Upcoming Church Fiscal Year

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	
2019	\$1,998,234	}	x	5.0%	=	\$105,423				
2020	\$1,841,168						\$26,300	\$26,300	\$26,300	\$26,523
2021	\$2,486,002									

D. Allocation to Each WUS Restricted Fund

Report of the WUS Trustees' Fiscal Year Ending March 31, 2021

WUS Restricted Funds

Market Value of Total Portfolio	614,863
	3/31/2020

856,042
3/31/2021

Market Value of Total Portfolio

Start of Trustees' Fiscal Year

All WUS Restricted Funds			Allocated Value for Each Fund	Cash Flows during WUS Fiscal Year		3/31/2020		Allocated Value for Each Fund (includes effects of market activity)	Estimated Distributions for Trustees' Upcoming FY 3/31/2021 to 3/31/2022
Terms Specified by Donor				per Trustees' Report last FY	Outflows	Inflows	Adjusted Allocated Value for Each Fund after Cash Flows (before market activity)		
Fund Name	Source of Funds*	Distrib. Code**			Design'd Distrib. Rate %	Actual \$		\$ Value	% of Totl Port.
Stanton	Inc	A	862	5%	(43)		819	0.1%	1,150
Pratt	Inc	A	412	5%	(21)		391	0.1%	550
Parkhurst Organ	Inc	A	6,133	5%	(307)		5,826	1.0%	8,185
Nash Nursery-1	Inc	A	5,317	0%	0		5,317	0.9%	7,469
Nash Nursery-2	I&P	tbd	8,485	0%			8,485	1.4%	11,920
D. Nash	I&P	A	2,686	5%	(134)		2,552	0.4%	3,585
Borden	Inc	A	3,663	5%	(183)		3,480	0.6%	4,889
Sue Swap	Inc	A	44,209	5%	(2,210)	6,000	47,999	7.9%	67,428
Sandy Fries	Inc	tbd	4,995	0%			4,995	0.8%	7,017
Storer Mem	Inc	tbd-Intern	56,198	0%	0	400	56,598	9.3%	79,508
Spaulding Mem	Inc	tbd-i	43,183	0%	0	307	43,490	7.1%	61,095
Reinhardt	Inc	tbd-Intern	45,527	0%	0	324	45,851	7.5%	64,411
Spencer	Inc	tbd-Intern	38,888	0%	0	277	39,165	6.4%	55,018
Trageser	Inc	tbd-i	2,823	0%	0	20	2,843	0.5%	3,994
Banks Intern	Inc	tbd-Intern	9,700	0%	0	1,062	10,762	1.8%	15,118
G. Cook	Inc	A	87,449	5%	(4,372)		83,077	13.6%	116,706
C. and G. Cook	I&P	A	58,765	5%	(2,938)		55,827	9.2%	78,425
Cummings	I&P	A	1,043	5%	(52)		991	0.2%	1,392
Bartlett	I&P	A	22,299	5%	(1,115)		21,184	3.5%	29,759
H. Hall	I&P	A	3,454	5%	(173)		3,281	0.5%	4,610
Caverly	I&P	A	944	5%	(47)		897	0.1%	1,260
Eustis	I&P	A	14,323	5%	(716)		13,607	2.2%	19,115
I Kelley	I&P	tbd	519	0%			519	0.1%	729
H. and F. Stone	I&P	tbd	79,544	0%			79,544	13.1%	111,743
Cerny-Thomases	I&P	A	13,144	5%	(657)		12,487	2.0%	17,541
Meditation Garden Maint. Fd.	I&P	A	12,835	5%	(642)	2,100	14,293	2.3%	20,079
The Baldwin Fund	I&P	A	47,464	5%	(2,373)		45,091	7.4%	63,344
TOTAL			614,864	N/A	(15,984)	10,489	609,369	100%	856,042
									(35,858)

* Source of Funds for Distributions

Inc = May distribute *only* income

I&P = May distribute income & principal

** Distribution Codes:

tbd-Intern = tbd and shall be used only for Intern Minister

tbd-i = tbd and may be used for Intern Minister

A = automatic 5%

tbd = to be determined upon request and per donor instructions; may be \$0 (e.g., no request)

Report to the UUA

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

	2021	2020	2019	2018	2017	2016
Signed Members	228	244	262	268	286	286
RE Enrollment	50	55	53	63	60	100
Pledging Units	135	136	145	146	142	145
Average Sunday Attendance	100	110	120	119	118	163

Report of the Standing Committee

2020-21 Standing Committee:

James Pidacks, Co-Chair

Fritzie Nace, Co-Chair

George Wood, Clerk

Judy Murray, Co-Treasurer

Rev. Heather Janules, Ex-Officio

Patty Cameron

Mike Hyde

Sheila Puffer

Sue Kiewra, Co-Treasurer

Roberta Brown

Patrick Draine

Terry Currier

Ivan Correia

During our annual retreat in September, the Standing Committee engaged in a process to help set goals for staff, the Standing Committee, the committees of the society and the congregation so that we can better align our energies and endeavors, to help us in evaluating not only staff, but in our work together each year. The Standing Committee identified 6 broad goals this past year:

- Build and support WUS community during COVID
- Continue to nurture spiritual growth
- Expand leadership development
- Review the needs of and further develop programing for youth ministry
- Continue and expand racial justice advocacy
- Expand environmental practices and advocacy

Below is a summary of how we acted upon these goals through-out this past year.

Last spring, when the UUA suggested that our congregations continue to hold virtual worship services through June of 2021, many of us thought we surely should be able to be back to in-person worship before then. However, with the pandemic continuing in waves of increased cases, Winchester Unitarian Society kept the safety of all of our congregants at the forefront and maintained on-line worship,

meetings and gatherings. We can't praise our staff highly enough for the tremendous job they have done in offering inspiration, beautiful, creative, engaging worship each Sunday. We are very fortunate!

We appreciate the work of the appointed Pandemic Planning Task Force (Kim Foley, Dirk Stryker, Kerry Bartlett, Thomas Slack, James Pidacks and Fritzie Nace) in setting up guidelines for use of the church and grounds, and of the administrative and custodial staff (Thomas, Jenny, Mike, Michael and Joe) for keeping the building clean and sanitized. We appreciate the Building Committee and a generous donor for implementing HVAC improvements that will make our space safer with improved air circulation and filtration. It is our plan and hope to return to in-person worship in the fall of 2021!

In preparation for a return to in-person worship in September, we recognize the need and value of maintaining an on-line presence and have named a Technology Task Force to plan and implement technology upgrades that will enable WUS to offer both going forward. Thank you to Steve Forcucci, Don Daniel, Dan Hermes, Scott Randall, Tyson Kamikawa, Phil Coonley and James Pidacks.

We also appreciate the work of our Co-Treasurers in applying for the Federal Paycheck Protection Program, which kept us financially sound for this year, and, with the loan becoming a grant, gives us breathing room going forward. The co-treasurers have skillfully guided us through this challenging time and have given us a clear view of our financial standing. They stand ready and willing to support a new Treasurer! We hope that someone steps forward to serve WUS in this very important role.

Our Pledge Team (Alison Kirchgasser, Stephen Perepeluk and Robbie Brown) set to work in February with care and sensitivity, reaching out to members and friends to secure financial support for the Society's 2021-22 budget year. With the many challenges of Covid safety guidelines and the economic challenges and uncertainty of the continued pandemic impacts, the Standing Committee did not plan a fundraiser during this year. We are beginning to plan for fundraising for the 2021-22 church year, and hope that many of you will join in. We hope that fundraising will also be a great opportunity for us to re-connect in person and raise some FUN too!

In January, the final report of the RE Visioning Team was received after a year and a half of extensive information-gathering. We are so grateful to Patty Cameron, Terry Currier, Erin Graham and Karen Caputo for their hard work in helping us to identify the strengths, challenges and desires of our congregation's Religious Education programs. Out of their process, a Search Committee was formed and they have continued the work of discerning the needs for next year and engaging in a search. This process has revealed that traditional Directors of Religious Education are becoming difficult to find and that we may need to be creative and flexible. This is a pivotal time for our congregation as we can use this opportunity to envision new possibilities and to re-engage as a congregation with our religious education program through volunteering. We anticipate that these conversations will continue next church year. We appreciate the efforts of the DRE Search Committee (Terry Currier, Sarah Milt, Terrill Levering, Tyson Kamikawa, Lucille Cannava, Dir. Youth Ministry- Sam Wilson and Rev. Janules) for their time, creative thinking and dedication to our RE program and families.

The SC is proud to support the continued commitment of our congregation to Racial Justice and Equity. To that end, the committee approved a proposal from the Racial Justice Task Force "to conduct a series of conversations within our congregation, to see clearly on the ways that policies, actions and attitudes

in our society have maintained institutional racism, and how we can work toward being an “intentionally pro-active, radically inclusive multicultural anti-racism congregation.” We hope that many of you have had the opportunity to participate in one of these valuable conversations. We look forward to the Racial Justice Task Force’s continued work with our congregation.

The Standing Committee is also proud to support the Green Sanctuary committee’s proposal to act on our Mission of being a community devoted to environmental responsibility. In September, we approved the use of monies in the “Toward Zero WUS CO2 Emissions” fund “to obtain an initial professional analysis of potential changes to our building’s energy use” by InterFaith Power and Light. The results of this analysis will be received by our May meeting and will inform decision-making going forward.

We thank the Membership Committee for their continued attention to our outward-facing engagement with visitors and newcomers through Bring-A-Friend Sundays, eye-catching banners and outreach to virtual visitors. We thank the Nominating and Leadership Development committee for running “Harvest the Power,” a leadership development program.

Recognizing the need to find more effective ways to reach out to new families and friends in our area communities, a Marketing and Communications Task Force has been identified to follow up on the 2018 Marketing Study. This group will review the design and use of the website to better reflect all that is going on at WUS, examine Highlights for more reader-friendly layout, and identify a marketing plan.

Looking forward to next year, we will not only continue the efforts named above, but hope to review capital needs and develop a Capital Plan to guide opportunities presented by generous donations and identify needs for specific capital fundraising.

It has been an honor to serve the Winchester Unitarian Society as your Standing Committee this year. We so appreciate the commitment of our members and friends, particularly during this challenging year, who have contributed in so many ways to the continuation of our Beloved Community.

Report of the Building & Grounds Committee

This year, the Building and Grounds Committee worked together with Church Administrator, Thomas Slack, and the Sextons on the maintenance and operation for the Winchester Unitarian Society’s physical plant and grounds. This was a highly unusual year with the pandemic, but long-term access to a nearly empty building presented unique opportunities to attack projects normally too disruptive to consider. The Building and Grounds Committee’s took full advantage of this with the primary projects for 2020-2021 listed below:

- **Replaced the clapper and the strike plates from the big bell in the tower:** Our biggest bell no longer rang with a pull of the rope. Church bell experts diagnosed the problem as broken strike plates (the clapper actually hits these plates inside the bell not the bell itself). The broken

components were removed, shipped to the factory in Wisconsin, repaired, returned and replaced. While at the church, the experts inspected the remaining bells and chimes and declared them in good shape.

- **Installed a comprehensive security system:** A large portion of our proposal to the state to fund a security system for the church was approved (thank you, James Pidacks). This funded the installation of new motion sensitive exterior lighting, security cameras outside at key locations, interior cameras monitoring important access points, plus a web-based monitoring and control system for all of the cameras. In addition, Wi-Fi door bells and electric door locks were installed at the two main entrances, front and back. This augments the re-keying of all primary exterior locks done last year.
- **Plans developed for major landscape improvement on Mystic Valley Parkway (MVP) side:** Thanks to a generous donation from Frank Virnelli, in honor of his wife, Judy, Julie Khuen completed a comprehensive plan to greatly improve the grounds of the MVP side of the church. Further, the Retired Pastoral Care Group donated funds and spearheaded an engraved brick campaign for the two new brick walkways leading to the church. A new terrace, accessible walkways and gardens both will enhance the beauty of the church and further connect it to the town center. The new landscape will be installed early this summer.
- **Major HVAC upgrade for health and efficiency:** When the main part of the church was built in 1899, the heating and ventilation system was designed to use outside air to avoid the contagion risk of captive, recirculated air (this was in response to the global flu pandemic of 1840 – sound familiar?). All the external air vents had been closed over the years to promote heating efficiency. We have carefully reopened some of these vents by adding modern control systems to add outside air into the heating system when the air quality sensors call for it. In addition, we have restored heat into the Chapel and Winsor by repairing the original systems and adding modern controls. These improvements, funded completely by anonymous donors, leverage the original air circulation design to dramatically improve the air quality in both the Sanctuary and Symmes during its most crowded times.
- **Major upgrade of the church heating control systems.** After an extensive study of our heating system, we determined that there are seven primary and secondary steam pipe zones. Of these, only four are controlled (valves connected to thermostats) and three are uncontrolled (one primary and two secondary). This means when any of the four controlled zones called for heat, all of the uncontrolled zones are heated as well. As a first step, we added a controller to the primary, uncontrolled zone, connecting it to new thermostats in Winsor and the Chapel. The impact of the remaining uncontrolled areas will be managed through adjustments to individual radiators. Next, we are installing a complete Wi-Fi based, smart thermostat system with phone app monitoring and control capable of managing our complex and changing use patterns. This will allow the Administrator to assure that we are heating the right zones at the right time while greatly reducing the waste of heating zones not needed. In sum, we are adding 2021-era management and control to a system installed in 1899.
- **Plans developed for a new gender-neutral, accessible bathroom on the ground floor:** Thanks to a generous anonymous donor, plans were developed (and our now being re-developed) to locate and

build a new accessible bathroom. This will be located so it is available from anywhere on the ground floor including Metcalf Hall, the Chapel and the WUSYG room. The initial location in the Lower Lobby proved undoable, as, after some intense drain forensic efforts, we found that the soil pipe was not where we expected it to be. The church has two soil pipes, however, and the second pipe runs in and around the Pantry. This is now the center of our location efforts. The addition of this new bathroom will not only make the church accessible at every level but also increase our ability to utilize and rent Metcalf Hall or the Chapel.

- **Other notable areas of maintenance:**

- Completely emptied the Dungeon storage room, repaired the long ago, water damaged ceiling and discarded many old, not needed items. This freed up space for WUSYG storage near their room.
- Replaced worn out components for the system that rings the small chimes every hour.
- Repaired and cleaned the grandfather clock in the cloistered lobby.
- Renovated the furniture in the Music Director's office. Designed and constructed special purpose shelving for choir folders (re-purposing the old hat racks outside of the Sanctuary and Metcalf Hall), removed and replaced rest of furniture with more attractive pieces useful for music storage.
- Guided the completion of the Town's intersection project where it abutted the church property.
- Rewired the light fixtures in the Lower Lobby, upstairs Vestibule, MVP entranceway greatly increasing their light output plus increased the brightness of all the fixtures in the Chapel.
- Repaired and painted the exterior windows of the church.
- Worked with the Nursery School on a plan to replace the chain link fence at the back of the parking lot.
- Worked with the Green Sanctuary Committee and their contractor on a comprehensive energy analysis of the building.
- Repaired some leaking flashing on the roof over the Parlor.
- Replaced the worn, stained carpet in the Winsor room.

Potential Projects for 2021 – 2022

Projects that the Building & Grounds Committee is considering include:

- **Complete the balancing of the new heating system controls:** Including modulating the radiators in the remaining uncontrolled zones and programming the zones to match usage.
- **Freshen up the Lower Lobby and the Chapel Lobby:** The Re-Do team has begun to address these areas to help make look less like a basement and more like inviting spaces.
- **Re-do the two existing ground floor bathrooms:** They are tired, dated and look every bit the part of basement bathrooms. A few key improvements would go a long way to modernizing them.

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.

- **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 some delayed upgrades to the kitchen including replacing the dishwasher.

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

Report of the Employee Relations Committee

During church year 2020-2021, the Employee Relations Committee continued to carry out its responsibilities as set forth in Article 18 of the Society's by-laws. As best we could, given the restrictions imposed by Covid-19 protocols, we maintained contact with staff members and with Reverend Heather. Our goal, as always, is to hear and respond to any concerns that staff may have and to foster a positive work environment at the Society. The details of most of our work are, of necessity, treated as confidential.

Respectfully submitted,

Sara Delano, Nancy Scott Newhouse, John Russell

Report of the Fellowship Committee

Our Fellowship Committee usually enjoys setting up and helping prepare for events in Metcalf, slicing pies on Pie Sunday and generally springing into action when we hold congregational events together. Sadly, that was not in the cards for this year. We very much look forward to a new church year with strong immune systems, far less COVID and far more fellowship and merriment together!

Report of the Green Sanctuary Committee

IN NATURE
NOTHING EXISTS ALONE



- Rachel Carson

Join us Sundays @ 10:30
www.winchesteruu.org



GS Meeting regulars: Maggie Russell, Lindy Brown, Sheila Puffer, Fritzie Nace, Cynthia Randall, John Keller, Sue Doubler and Phil Coonley (CO-Chairs).

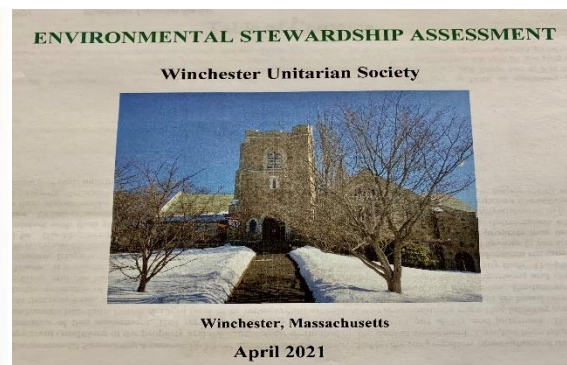
Contributors: Shealagh Crowley, Woody Wood, Pete Baldwin, Amy Hunter, and Susan McPhee.

Summary

Despite the challenges posed by the coronavirus pandemic and the physical closure of the building, the Green Sanctuary Committee had a highly productive year of accomplishment, and in planning a 2021-22 program of: eight community-wide events; follow-up on our April, 2021 Environmental Stewardship Assessment; fundraising for the "WUS Zero CO2 Account"; and authentic relationship building with a community impacted by environmental injustice.

National Recognition for Our 100% Green Electricity Campaign

Our main congregant campaign of 2019-2020. - to promote how easy and important it is to purchase 100% 'green' electricity - was disrupted by the physical closure of the church by Covid 19. However, 6 new sign-ups were achieved by Dec. 2020 when we submitted this project in a multi-faith US Cool Congregations Challenge. The 31 WUS households, including the church, which switched to 100% local, renewably-sourced electricity was equivalent to eliminating 317 metric tons of further CO2 pollution annually. WUS was runner-up in the category of 2021 Community Inspiration.



Initiation and Completion of Environmental Stewardship Assessment

With the support of the Standing and Building Committees, an Environmental Stewardship Assessment (ESA) from Mass. Interfaith Light and Power (MA IFP&L) was initiated. The cost of \$895. was paid from the "Toward Zero WUS CO2 Emissions" Account initiated by the GS last church year.* Thomas Slack, Chuck Khuen, Sue Doubler, and Phil Coonley provided the investigators data on energy and room use, a site visit, photos (e.g. ice dams), and heating system details.

Our ESA compared energy use and costs:

- to our past as recorded in a similar 2005 assessment;
- to other churches in Massachusetts today; and
- to best practices we could adopt going forward.

And Found:

- Our **Energy use intensity** - the amount of energy used annually per square foot of building space - is a little above average for churches, and average isn't very good. We have lots of stained glass windows and uninsulated walls of stone.
- **The Financial cost** of our energy use, however, is excellent. We spent \$25,000 in 2019 for all our energy use, approximately 3.6% of our overall budget. The range for churches in our state is 2% to 20%.

- Our **carbon emissions reduction** is also excellent, down 60% since 2005! We are thus well ahead of the new Massachusetts goal which calls for a 50% state-wide **reduction by 2030 from a 1990 baseline**.
- **If we follow all 15 of the Assessments' recommended actions, our church could achieve the states' 2050 "net zero Carbon dioxide" goal by 2035, or even sooner. In so doing, the Winchester Unitarian Society could inspire other institutions and home owning congregants to accelerate ceasing their own CO2 pollution that threatens much life on our planet.**

The GS Teracycle campaign (i.e. sending select product packaging back to willing manufacturers) was also disrupted by the church's closure, given our recycling station was in the Symmes Room and most Congregants stopped coming by the church at all. In late winter, we moved the down-sized station for Toms of Maine products to the enclosed outside entry area near the food donation box. (Yeah! Maggie and Shealagh!)

Looking ahead we have four activities ongoing this spring and summer::

1) Program planning for 8 (!) 2021-22 WUS live community-wide events;

We are now in initial planning for eight GS events (hopefully many with partner organizations). Five of the event topics were introduced to the Congregation during the Earth Day service via 90 second" videos. (i.e. Amy Hunter on the just-passed Mass. Energy "Road Map" Bill; John Keller on emerging Federal Climate policy; Phil Coonley on the WUS's new ESA; Pete Baldwin on removal and storage of CO2 from gas-fired electricity plant smokestacks; and .Fritzie Nace on The Winchester Climate Action Advisory Committee's action ideas.* For example, the Action Ideas event will go beyond presenting to in-depth discussions, witnessing, frank Q&A s, and hopefully some live sign-ups for home energy assessments, WinPower, and contractor appointments for Solar arrays or Heat-smart electric heating estimates. Enough time to really get participants to actually take their first step to take another of the many household actions one can take to lower one's carbon footprint.

The sixth event would be the **second_Winchester Repair Cafe**. We are helping plan the first to be held at the First Congregational Church in late September, 2021. It will be an opportunity for free repairs of common household gadgets (e.g., small appliances, bicycles, etc.,) and skilled volunteer mending of favored clothing. The seventh event will address the **global pollution of plastic waste**. And the eighth will use have our church's ESA as a focus, and be intended for anyone who wants to have their church or other institution clean-up their CO2 and other ongoing pollution. The eighth will focus on **environmental justice** from the perspective of those who live and/or work where the injustice is, has, or soon may be most extreme.

2) Dissemination of WUS ESA findings throughout congregation;

3) Creating a new "Environmental Responsibility" section for the WUS website; and

4) Developing campaign to promote contributions to the "WUS Zero CO2 Account" *

5) Identification of a minority led environmental organization(s) which would welcome WUS as an ally or co-conspirator.

*"Toward Zero WUS CO2 Emissions" Account.

Some WUS Congregants routinely buy commercial carbon offsets* to neutralize the carbon dioxide (CO2) 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 CO₂. Funds donated to the “Toward Zero WUS CO₂ Emissions” account are restricted to: “ use in planning and implementation of steps leading toward a zero or negative church carbon footprint.” By Feb. 1, 2021 the account’s balance was \$1600. 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. And rebates. <https://www.masssave.com/rebates>. 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 CO₂, so the “offsetting” donation would be \$23.40. Example 2, for two people flying round-trip in economy class from Boston to Lhasa via Beijing, China would generate 7.52 metric tons of CO₂, so the offsetting donation to “Toward Zero WUS CO₂ produce Emissions” would be \$150.40).

Report of the Membership Committee

2020 - 2021 Membership Committee¹: **Chair** Marilyn Mullane (4th); **Members:** Naomi Delairre (3rd), Gloria Legvold (3rd), Deb Eiler (2nd), **Co-Chair** Robin Wolf (2nd) and Sophia Sid (1st); and **SC Liaison** Patty Cameron

2020 - 2021 Budget: \$1,200 - Membership exceeded its budget this year and Standing Committee generously augmented our budget by \$600. We had a banner year for banners! This was the primary way we interacted with the community this year; sometimes we advertised a particular service like Earth Day and other times we shared our values like “Compassion is the Answer”. The Standing Committee addition to our budget ensured that we had a decent supply of banners to rotate through so that our face to the community stayed fresh. Thank you, Standing Committee!

Goals: Given the pandemic, our inability to gather in person for worship or social occasions, the Membership Committee decided against establishing new member and visitor goals. Instead we decided to try new things to stay connected with the congregation, like playful Bring a Friend pulpit announcements, additional thought-provoking banners (our plan is to cover all seven principles) and personal outreach, i.e. “The Good Place” postcard was sent to every congregant!

Activities, new projects and outreach:

- Rev. Heather produced a **new updated video** to introduce church shoppers to WUS
- **Inviting banners**² including lay led summer services, VOTE your Values, Christmas Eve, 2nd principle and 7th principles and Earth Day (see examples at end of this report)

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

² All our banners are produced by the talented and creative Kristine Kamikawa and we partnered with SAOC/Racial Justice on the 2nd principle and Green Sanctuary with the Spirituality and Nature Covenant Group on the 7th principle.

- November 22nd **New Member Sunday** where we welcomed Linda Copeland, John Healey and Susan Woodward with videos of the book signing
- **Four Bring a Friend Sunday's** from the comfort of your home - October 18 (timely Community Policing topic), November 29 (thought provoking Reflection of Monuments), April 18 (fun "The Good Place") and May 23 (always popular Youth Sunday)
- **Chamber of Commerce gifts bags** for new buyers in Winchester and bags for visitors, ready for our return
- **Benchmarking** with Membership Committees for First Parish Bedford and Follen Church to learn how others are engaging their members and attracting visitors; Carlisle Unitarian Church for building its RE program
- Participated in the Racial Justice Planning Group's **Widening the Circle of Concern** program of self-reflection and brainstorming

Proposed activities for 2021 - 2022 Church Year:

- **Social events** like Welcome Back Breakfast and Spaghetti Dinners, if we are able, or personal notes and phone calls to congregants, if virtual
- Updated Membership **Welcoming brochure**
- Possible **banners** for principles 1, 3, 4 and 6
- **Faith Forward pilot curriculum** which fosters engagement with newcomers, new members and long-timers
- **Usher and greeter refresher training**
- **Generic Local Postal Customer mailing** for a WUS service, like Earth Day

Respectfully submitted by the 2020 - 2021 WUS Membership Committee

Inviting Banners created this year:



Annual Report for Music

Well, what a year it has been. As of April, 2021 I have produced 195 music videos for our Sunday services. These include the Gathering music, Kindling of the Light, Offertories, the Postlude, and occasional contributions to other service pieces; underscoring of the *First Reflection* or other musics. These videos reflect contributions from the Adult Choir, the Youth Choir, the Children's Chorale, the Soloists, members of WUSYG and a host of contributing musicians including Tyson Kamikawa, Steve Forcucci, Maury Wood, Chris Russian, Alison Kirchgasser, Aryn Richardson, Eli Forcucci, Dan Hermes, and please forgive me if I have omitted anyone.

Since the pandemic began the choir and I have assembled 74 hymns for worship, many with creative arrangements and additions by Chris Russian on flute and Tyson Kamikawa on saxophone. Dan Hermes has added some digital instruments and sound editing to a few as well. Some of these hymns have been sung multiple times, and I hope to create a database on our website where people can go to "sing a hymn" at their leisure.

I believe I speak on behalf of the community when I say this work has been creative and fulfilling in some ways, but in the whole has felt like a life-line, keeping us connected, but not nourished in the ways that creating music nourishes us in person. We are all looking forward to getting back to "normal" when the time is right.

Our Tuesday night rehearsals with the Youth Choir and the Children's Chorale have been very successful - more so than I believe we could have imagined. Hats off to the work Kirsten Hart has been doing with the Chorale. I have been enjoying the work with the Youth Choir immensely and it has been a great opportunity for us all to connect. Playful pre-choir games in the lobby were replaced with playful renaming of our screen avatars, creative screen backgrounds, and all manner of eyebrow. Plus - family pets get to make an appearance during rehearsals. Both the Chorale and the Youth Chorus have virtually assembled a song about once a month for our worship service. Kudos to our young singers who have sung along to our practice tracks and recorded themselves! The year wraps up with a virtual concert on May 18th at 6:30Pm where we will share many of the performance videos we have put together this year.

The concert series was another success of the music program and I am very proud that we managed to pull off a virtual concert season this season. With the two concerts from last program year we have produced a grand total of five virtual concerts. Attendance was good overall and the comments received were very positive. The concert series was dedicated to music by African-Americans, including

classical piano music in the November concert, a historical overview of Black jazz composers in our Jazz concert, and the wonderful Kemp Harris, who delighted us in April.

The Concert Series had contributions of \$8,525 from our generous sponsors and \$3,725 in on-line donations during the performances. This year we partnered with the NAACP, Winchester ABC, and the UU Urban Ministry and were able to share \$1,862.50, divided between those organizations. This “share the plate” felt really meaningful and necessary during the pandemic time, but is also a practice we may want to carry forward. There are still some expenses being worked out, but we are confident in being able to meet our commitment to the church of raising \$8,000.

I do want to thank the Music Committee and James Pidacks without whom the concert series would simply not be possible. James in particular volunteered many hours of time and was key in getting the concerts out of the sanctuary and onto the Zoom platform. Plus, we had outstanding lighting for several of the concerts.

Our two Music Sundays were redesigned this year as producing a larger scale choral work was an impossibility. The fall Music Sunday focused on music by African-American composers and included participation from our soloist and volunteer musicians. Our spring Music Sunday looked at our tradition of hymns. This was a service I was happy to present as it has been on my mind for some time.

All told, the year was strangely similar to other years in that we created music for worship, had a concert series, rehearsed and taught our young singers. But, it has also felt very distant. A number of singers have not had the opportunity to submit recordings, either because of work schedules or technological issues. This is a difficult thing to do and some less experienced singers found it more difficult. It is so much easier, and rewarding, to have the presence of other voices surrounding you; like a wave, it carries you forward. I think we have all experienced that when we try to sing along with the hymns. It is music in one-dimension, not multiple dimensions. However, all told, we have weathered the pandemic in a way that we can be proud of.

On behalf of the Music Committee,

John Kramer

Report of the Pastoral Care Ministries

In a year that was dominated by the impact of Covid-19, the Pastoral Care Ministries, like every aspect of our church's outreach, had to adapt to the reality of safe health practices in its activities. The PCA ministries is comprised of several groups whose common vision is 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 past year was characterized by widespread anxiety regarding the impact and duration of the pandemic. So, pastoral care of the congregation, just when most needed, was necessarily somewhat restricted relative to past patterns, while continuing to be as fully-engaged as practicable.

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, when possible, visits to those in our congregation who are ill, unable to attend church regularly, or simply appreciate a visit. The conditions of the COVID-19 pandemic largely precluded in-person meetings and congregant visits for the past year, but the group continued its regular monthly meetings and initiated online educational programs via Zoom, while maintaining contacts with congregants receiving pastoral care via telephone and "socially distanced" walks.

Without in-person church services, delivering the traditional Sunday chancel flowers to recipients was not an option. So, in its place the PCAs initiated a practice of sending personal notes following Sunday service to congregants mentioned in announcements or in Zoom "chatroom" conversation. Another occasion for PCA/congregant connection during pandemic restrictions was inaugurated: an open invitation to monthly Tuesday morning "Coffee and Bagels" conversation and sharing with PCAs and Ministers via Zoom.

Under the guidance of the Ministers, an "End-of-Life" workshop designed to educate members considering important decisions in regard to advance directives was produced with PCA participation via Zoom last June. It followed earlier in-place workshops on "Creating A Spiritual Legacy" led by Intern Minister Marianne DeBlasi. A subsequent online program, with guest speaker Kathy Kemp, Geriatric Care Manager, entitled "Aging in COVID time" was open to public registration as well as the WUS congregation and took place January 4, 2021.

PCA member Carol Delaney, a Community Chaplain, assembled a comprehensive Resource Guide, with indexed listings of community and health care supports, available for reference by members of the WUS congregation in the Michelsen Room Library. She also organized smaller versions of the Resource Guide for use by individual PCAs.

During the past year Barbara Keyes shifted to PCR after many years serving as a devoted PCA. Ongoing PCAs are Lee Barton, Dennis Brett, Vicky Coccoluto, Carol Delaney, Kim Foley and Donna Reed.

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, Barbara Keyes, Carole Nassif, Maggie Russell, and Maria Shepherd.

This year, the PCRs spearheaded a successful funding campaign to augment the generous Virnelli family gift, enabling completion of the Bell Tower Terrace and engraved Brick Walkways dedicated to the Pastoral Care Ministries at WUS. 140 bricks were ordered from the congregation, many in memory of those whom we have lost since the last brick campaign several years ago.

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. In this past Church year, Meals and Rides were not called upon due to concerns about the pandemic.

The **Family & Caregiver Support Group** meets monthly in a confidential and safe setting with family members, caregivers, and loved ones of individuals living with mental illness, and is co-facilitated by Maria Shepherd and Isobel Magee. The National Alliance on Mental Illness (NAMI), under the auspices of the Mental Health Awareness and Support Initiative (MHASI) provides supportive resources and training for meeting leaders.

Memorial Service & Reception Team, under the prior leadership of Sara Delano, Karen Erikson, and Vicky Coccoluto, has traditionally worked closely with the PCAs and Rev. Heather providing support and practical guidance for families holding memorial services and receptions at the church. The Memorial Team has been on standby for the past year while large in-person gatherings at the church were suspended, but will resume this valued outreach when the restrictions are lifted.

Submitted by Vicky Coccoluto on behalf of the Pastoral Care Ministries

Report of the Personnel Committee

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.

In December the Standing Committee approved a revision to the Personnel Policy Manual, which was last updated in March 2018. The major changes are new sections on storm/snow days, sabbaticals and intellectual property. Additionally, sections on employee benefits were updated and clarified. The new manual is available on the Members & Friends page of the WUS website.

Revisions to policies concerning computers and phones are in process. In most areas of church operations, the use of technology has increased and changed during the pandemic shutdown. We are working to ascertain and implement best practices to facilitate smooth functioning in all areas while assuring the security and privacy of data.

In conjunction with the work on computer policies, we are assisting the office staff in the development of an operations manual – the Book of Everything – and in the organization of WUS data on church-owned computers.

We continue to monitor advice from the Unitarian Universalist Association regarding employment practices. A written salary review procedure to ensure that all WUS staff are compensated fairly/competitively and that there is a defined, unified process/method and time for salary evaluation for all employees is in the final stages of study before being submitted to the Standing Committee for approval.

As the church seeks to hire new staff members, we have been working with search committees to craft job descriptions and will be involved in drafting letters of agreement.

We would like to thank staff for their thoughtful input into proposed policies.

Respectfully submitted,

Pete Baldwin, Sue Kiewra and Kathy Richardson

with Rev. Heather Janules

Report of the Religious Education Committee

The Religious Education (RE) Committee members were Lucille Cannava, Karen Caputo, Erin Graham, Ryan Levering, Naomi Magnoni (chair), Sarah Milt and Terry Currier as the Standing Committee representative. We started in June and most of the members met over the summer to help continue the connections we have with our families during Covid. Rebecca Kelley Morgan was the Director of Lifespan Religious Education. Many thanks to Rebecca and all the members for all their work and insight which has helped continue our connections during the pandemic.

In June 2020, the RE Committee discussed plans for the 2020-2021 church year with a focus on the summer as well as the traditional year from September to June since families were not able to have their usual vacations and/or summer camps.

The focus this church year was to:

- Support children in their faith formation and provide and plan for experiences and exposures with the church community while we cannot meet inside the building or with many of the church community members.
- Engage in family ministry in whatever way will work best during Covid Quarantine.
- Support the staff and volunteers from the congregation working with families to at least maintain participation.

This church year, in collaboration with Rebecca, the RE Committee was responsible for finding connections for in-person get-togethers on the church property and remotely when possible.

We pivoted several times to try and engage the community in person and remotely. Rebecca helped the in person faith representatives, created first reflections, consistently led Family Worship as the timing was established to make it work for those that were available and provided other remote options.

Summary of RE Committee Program Offerings 2020-2021

In-Person

Nursery to 8th grade (Sundays outside)

We watered plants, had book readings, carved pumpkins, painted coasters, filmed parts of the pageant, enjoyed a solstice spiral, held the annual Easter Canned Goods Hunt, and spent time together practicing social distancing with our faith community. Many thanks to those who volunteered to help with these connections with the younger congregants.

Remote

Nursery to 5th grade: (Sunday morning)

Juanita Simms led a fun and warm environment for children during services in the winter and continued throughout the year. The need for this remains consistent and there are several regulars who look forward to seeing Juanita every week. Thank you Rebecca for setting this up.

6th-8th grade: (Sunday afternoons)

Rebecca reached out to a Chicago UU to partner with them for this age group for “Crossing Paths,” a “Neighboring Faiths” curriculum from Soul Matters. Thank you Rebecca for leading this program.

Potluck Theology (Sunday afternoons)

The RE Committee will have hosted four Potluck Theologies by the end of the year two of which were in-person. Although no food was present except for the pumpkin carving, they have been intended as a way to teach families together about different faith values as well as an opportunity to continue the camaraderie within the WUS community which was successful. With the help of all of us collaborating together, RE Committee Members, Rebecca, etc, we were able to reach out to the larger community on some of these to provide a more intergenerational feel.

- October Pumpkin Carving (in person)
- December Solstice/Advent Spiral (in person)
- February Valentines for WUS congregants
- March Easter egg dying

JanFest (One Sunday in January remotely)

WUS children look forward to JanFest every year. The RE Committee Members knew how important this was and with Erin, Ryan, Sarah, Heather, Rebecca’s and many others, we were able to make it happen on zoom during Covid Quarantine. As the children consider it a highlight of the RE church year, we endeavored to make sure this year was no different. A special thanks to the volunteers and staff who again made it a success: Sarah Milt, Linda Copeland, Ryan Levering, and Matthew Bronski offered sessions on Crocheting, Tarot, Bread Making, and Collage Making. JanFest was opened to the entire congregation even with Covid Quarantine to make it an intergenerational event. Some WUSYGers participated as well as a few adult members.

Supporting Parents

This was a difficult task. We reached out through email and phone calls to get feedback but most parents are finding an overwhelming amount of screen time making it difficult to connect remotely. In

person, they are able to relax together on our Sunday mornings socially distanced when the weather is not too cold and wet.

Administrative Tasks

We continue to use the shared drive for RE Committee documents and resources, which helps with coordination and will help future RE Committees.

Looking Forward

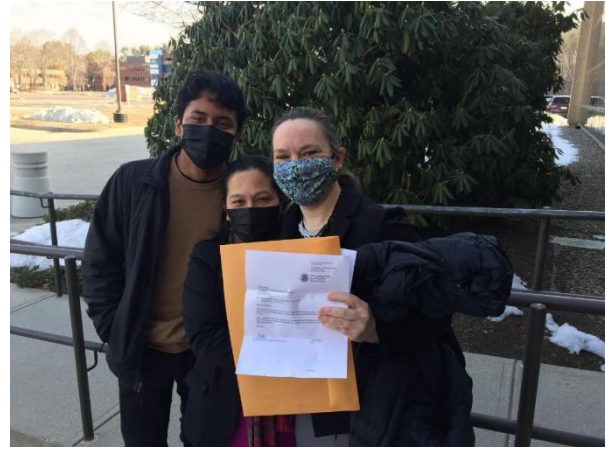
With the COVID-19 emergency still on-going and Rebecca's resignation that will happen this summer, there are many questions about what the RE program will look like in 2021-2022 and the coming years. Despite the uncertainty, the RE Committee is very engaged in setting overall goals and details for programming. We're looking forward to having OWL run next year and to brainstorm ideas to continue to make the RE program more enticing for children and more helpful for parents. We are working on new standards to suggest changes that the UUA have on making safer congregations as well as partnering with other committees at WUS to teach our children our faith values in action. A Visioning Group separate from the RE Committee, but with RE Committee representation and RE Committee input via the priorities set at the December 11, 2019 and January 15, 2020, has been created to look at all WUS children's programming (through high school) and evaluate options within the challenging WUS fiscal restraints. A Interim DRE Hiring Group has followed the Visioning Group to hire someone to continue to collaborate and run the programs for children in the fall of 2021.

Respectively submitted by Naomi Magnoni with thanks to the RE Committee 2020-2021

Report of the Sanctuary Task Force

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

On March 9, 2021, after three plus years in sanctuary, we received glorious news and learned that Maria had received official confirmation that she now has a one-year stay of deportation. Maria, accompanied by Senior Minister John Gibbons, Neesha Suarz from Congressman Moulton's office,



attorney Susan Roses and son Saul, learned the good news at the Burlington ICE office. This status will allow Maria to get a work permit, pursue further legal options, come and go as she wishes, and find new living arrangements with her family. She is also hoping to be successful with reunifying with her husband and son Isidro, who were previously deported back to Guatemala. And, Maria has a White House visit in the works!

Our official farewell to Maria was a bittersweet and moving worship service at First Parish on March 28th, where all Level 2 congregation volunteers were invited to attend via Zoom. Each supporting congregation was also provided with an opportunity to light a candle and express a wish for Maria. Our own John and Maggie Russell provided endearing well wishes from WUS!

In looking back over this isolating pandemic year, much of immigration justice work ceased, including vigils, Jericho Walks and, of course, all shift coverage at First Parish. Nevertheless, we still:

- Attended virtual Coordinator meetings as part of a ten-member interfaith coalition
- Sent cards, pictures and other well wishes to Maria the week of July 6th, September 21st, December 6th and February 22nd
- Joining with Representative Joaquin Castro, Senators Markey and Warren, advocated with the incoming Biden administration for immediate protection and relief for the over 40 undocumented immigrants living in sanctuary
- Called and wrote specifically to Representative Kathryn Clark to support Representative Castro's efforts (Bedford is in Clark's district)
- Signed a joint letter from Level 2 faith leaders for a stay of deportation and deferred action
- Foregoing Share the Plate, focused this year's fundraising efforts solely on WUS volunteers helping with First Parish's needs for Maria's family and Isidro's university costs which collectively brought in \$23,287; accordingly, we sponsored and sought a \$2,000 grant from SAOC for the International Institute of New England for its refugee resettlement program

We will not lose touch with Maria. Heather has signed her up as one of the knitters for the Prayer Shawl Ministry project, and this Sanctuary Task Force looks forward to hosting a social with Maria and her

family in Metcalf Hall once it's safe to gather in person! And, the Sanctuary Task Force is exploring new ways to build on our momentum from these past three years and further immigration justice work and opportunities for our WUS volunteers and congregation. Stay tuned!

Report of the Social Action & Outreach Committee

Advocacy

UU Mass Action \$900 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: indigenous rights, climate and environmental justice, decarceration and ending solitary, ending mass incarceration, immigrant justice, and economic justice. Working groups include: Black Lives Matter, Medical Aid in Dying, UU the Vote, and Gun Violence Prevention. [Link to our video to see more.](#)

Our 2020 grant will go toward the Anti-Oppression Campaign, focusing on Immigrants and Muslims.

Union of Concerned Scientists-\$300 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

Waltham Fields Community Farms \$500 <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.

ACE Alternatives for Community and Environment \$500 <https://ace-ej.org>

ACE builds the power of communities of color and low-income communities in Massachusetts to eradicate environmental racism and classism, create healthy, sustainable communities, and achieve environmental justice.

350MA \$500 <https://350mass.betterfutureproject.org/>

350 Massachusetts for a Better Future is building a powerful statewide social movement to confront the climate crisis, hold our politicians accountable and undermine the destructive influence of the fossil fuel industry. The name comes from 350 parts per million, the safe level of carbon dioxide in the atmosphere.

Justice

The House of Peace \$500 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 continuing care for burn victims from Iraq and Syria living at the House of Peace.

Network for Social Justice \$750 <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. 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/>

Royall House 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

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) \$500 <https://iine.org/>

IINE 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.

Mission: “We create opportunities for refugees and immigrants to succeed through resettlement, education, career advancement and pathways to citizenship.” Vision: “Refugees and immigrants are able to realize their dreams and contribute to New England’s growth and prosperity.”

MIRA “MA Immigration and Refugee Advocacy Coalition” \$500 <https://www.miracoalition.org>

Since 2016, **MIRA Coalition** has built support on Beacon Hill and across our Commonwealth to ensure the adoption of pro-immigrant policies in local communities. Part of the Safe Communities Coalition, MIRA encourages green card holders to become U.S. citizens, and naturalized Americans to vote. Since 2013, more than 1,400 Massachusetts residents have become U.S. citizens as a result of MIRA’s application assistance programs.

International

UU Service Committee \$1350 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

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.

Poverty

Council of Social Concern (Woburn)-\$2000 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 \$700 <https://www.facebook.com/winCHFARMmkt/> Anna’s Fund was recently launched 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 \$700 <http://www.missionofdeeds.org/>

Mission of Deeds 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 \$5000 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 \$600. <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.

Report of the Racial Justice Team Planning Group

The Racial Justice Team Planning Group (RJTPG) was formed from the folks that responded to the informal survey, conducted in the fall of 2018, about the Racial Justice Work at WUS that followed the raising of the Black Lives Matter Flag in January 2018. Encouraged by the workshop, “Decentering Whiteness,” which WUS hosted in the fall of 2019, this group began meeting more regularly during the winter of 2020. At that point interests lay in many areas of racial justice work, including book-reading events, showing and discussing relevant films, checking on similar activities at other local houses of worship, and researching hiring practices for expanding diversity within UU circles. The ideas for widening our communications while working directly with the Standing Committee and other WUS committees, - in effect, conducting a “racial justice audit” of WUS - were first pulled together in March of 2020. On June 17, 2020 we introduced a proposal to the Standing Committee for a do-it-yourself racial justice audit of WUS. The SC approved the plan of holding conversations with committees and other groups in the congregation. Our proposal included the following Vision statement.

VISION

We dedicate ourselves to moving forward in 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. We proclaim social justice and racial equity as a natural outgrowth of our Unitarian Universalist religious values. We envision this goal as being integrated into everything we do together: our spiritual growth, worship services, committee work, discussions, decisions, and internal and public actions. We promise an annual review process to assess and adjust our efforts on this journey.

We took most of the summer to prepare for meetings during the upcoming church year with the Standing Committee, as well as other WUS committees, and some ad hoc groups. Thus began a series of ongoing conversations within our congregation, led by members of the RJTPG, aimed at seeing more clearly the ways that policies, actions and attitudes in our society have maintained institutional racism, and how we can work toward being a more “intentionally pro-active, radically inclusive multicultural anti-racism congregation.” These initial conversations were completed when we were invited to meet with program staff in March of 2021 for an open conversation about what WUS would look like if our vision statement came true. Our intention is to continue to be in touch with all of these groups to facilitate an ongoing process of moving farther in the direction of actualizing a vision for WUS that all can embrace

In the meantime the Report of the Commission on Institutional Change, “Widening the Circle of Concern”, the culmination of a three-year in-depth study of experiences of UU people of color at the Association level and in UU congregations, was released at GA in June 2020. The accompanying study/action guide offered specific ideas and format for a series of workshops on the issues covered by the report. The RJTPG felt this would be an effective mode of communicating to members of the WUS congregation. The first workshop, on Theology, was thoughtfully and engagingly led by Rev. Heather on March 27, 2021. We are working on a second workshop for later this spring/summer.

We are eager to continue both our ongoing conversations with WUS Committees etc. and this particular workshop series in the fall. Please watch for news of these important opportunities.

The WUS office now has several copies of the “Widening the Circle of Concern” report that you can borrow; please contact our office administrator to obtain one:

Thomas Slack, Thomas.slack@winchesteruu.org.

Alongside the above activities members of the RJTPG have coordinated a new campaign, which you may have noticed in Highlights, called “Building Beloved Community.” We started with “Building Beloved Community, Book by Book,” and proceeded to “Building Beloved Community, Circle by Circle,” and “Building Beloved Community, Question by Question,” and so on.

Wondering what will be next? We hope you are and that you will participate in some of the ongoing conversations and workshops coming up. We need to know what you would like to build as part of our transforming Beloved Community.

Sincerely,

Vicky Coccoluto, Phil Coonley, Rev. Heather Janules, Gloria Legvold, Gordon McIntosh, Claire McNeill, Patty Shepard, and Sandy Thompson

The Racial Justice Team Planning Group

Report of the Youth Advisory Committee

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

Terms:

Marcy (3/3)

Roofus (3/3)

Patrick (3/3)

Christine (2/3)

Jenny (2/3)

*Patrick and Roofus have agreed to stay on for another year - beyond the traditional 3-year term.

Staff Members: Sam Wilson (Director of Youth Ministries) Sam is in his 7th year as DYM, Haley Wegner (Assistant Director of Youth Ministries) Haley is in her 6th year as ADYM.

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.

Important Items of Note:

**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.

YAC formed a subcommittee to search for a replacement in light of Haley's departure. Following are notes from the initial meeting of the search committee:

The Committee was grateful for Haley's participation, as she was able to walk us through the current job description and answer the Committee's questions. We spoke in detail about the qualifications, essential functions and responsibilities, and suggested a few edits.

We had a significant discussion around WUS' intention and or need to recruit a specific male or female person for the role. There was significant input from the Youth members of the Committee that the current balance of a male DYM and female ADYM should be maintained. This balance is important to the WUSYG Youth as it gives them options when they need a deeper level of counseling or discussion from the Youth Ministry team.

We also had a discussion around WUS' intention and or need to recruit a BIPOC candidate. We agreed that we will review the recommendations from the UUA Best Practices for Diversity Hiring at WUS.

These important discussions regarding the "vibe" of WUSYG and how the ADYM helps create that vibe will be built into the process for assessing and selecting the next ADYM.

We closed with a discussion on the recruiting process. Sam let us know that some former WUSYG members have already approached him regarding the role. Sam also has an extensive Youth Ministry network. The Committee agreed that Sam should post an alert to his network that the position is open and that a job description would be available soon.

The timeline regarding the hiring process (application review, interviews, etc) has been pushed back due to low turn-out of candidates to date. The committee has determined that a slower approach is best at this point, since Haley was able to work the "Young Activists" day camp, the end of the program year is coming near, and we feel that a bigger pool of qualified candidates will present itself in the summer months.

YAC has had extensive discussions with Sam and Haley about when and how to return to in-person meetings. Sam is hopeful that in-person meetings will be able to resume in a "typical" manner beginning in September. In the meantime, Sam is planning to shift to in-person outdoor meetings after the Young Activists (April Vacation) week. Discussion on in-person meetings, etc.

Sam recently presented YAC with his (in collaboration with Haley) ideas about expanding youth and young adult ministry. As a committee, we are very excited about the potential positive impact this could have on the church. Below are the expanded demographic groups that Sam is proposing to add to WUS's youth ministry:

- WUSYG - High school - currently in place
- WUSJYG - Middle school - “rebranding”
- WUSEA - 18-24 - ***new
- WUSYA - 25-35 -***new

Sam and Haley are working on gathering input and ideas for what this programming might look like. They are meeting with other church leaders to brainstorm how this new programming could grow and be supported for the long-term.

Sam and Haley have worked to update the WUSYG social media “presence” in a way that is inclusive of all WUSYG alumni - to reach across age groups.

Young Activists Camp:

In place of the service trip, Sam and Haley planned and executed a fantastic “Day Camp” program of three days - a “Young Activists Camp.” Young Activists Camp (& help with dinners)

Approximately 20 youth participated registered now

Sessions ran from 11am-8pm

In planning , Sam and Haley surveyed the teens on their interests, then contacted several different organizations and no one was accepting groups of volunteers, so we decided to pivot the service trip to a “young activists camp”

- Idea is that service is only one portion of social action, which is comprised of service, education, advocacy, civil disobedience, public witness
- One day was dedicated to have an environmental justice (service),
- One day was dedicated to racial justice day (public witness),
- One day was dedicated to LGBTQIA justice (advocacy) (education on all days!)
- Each theme was coupled with a related dinner - making change by financially supporting these issues: locally sourced vegan dinner, black-owned business, and queer exchange Boston catered meal

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.

“Typical” WUSYG Church Year Events: - this church year many of these events were cancelled or done virtually

- 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 - this year was a “Young Activists” Day Camp of three days
- Youth Sunday

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.

I feel blessed to have had the opportunity to serve this congregation as Chairperson of YAC for another year. I look forward to continuing on the committee for another year in whatever capacity is most helpful to Sam, his TBA Assistant, and the Committee. 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, but I am quite hopeful that our Search Committee will be able to recommend an excellent candidate to fill the position.

Submitted with love and gratitude,

Patrick Flaherty

Committee Chairperson

On behalf of the Youth Advisory Committee 2020-2021

Winchester Unitarian Society		
Proposed Slate of Officers, Representatives and Committee Members		
as of May 8, 2021		
term ending in	term ending in	term ending in
2022	2023	2024
Standing Committee (9 elected members, 3 annually for 3-year terms)		
Robbie Brown	Ivan Correia	Vicky Coccoluto
Patrick Draine	Terry Currier	Gordy McIntosh
Fritzie Nace	Woody Wood	Marcy Tompson
Clerk (annual term)		
Terrill Levering		
Treasurer (annual term)		
Brad Steele		
Assistant Treasurer (annual term)		
Stacy Colella		
Moderator (annual term)		
Martin Newhouse		
Denominational Affairs Representative		
Claire McNeill		
Trustees of Permanent Funds (3 elected members, 1 annually for 3-year term)		
Amy Hunter Maguire	Kathryn Maffei	Jennifer Dougherty
Employee Relations Committee (3 elected members, 1 annually for 3-year term)		
John Russell	Sara Delano	Nancy Scott Newhouse
Fellowship Committee (6 elected members, 2 annually for 3-year terms)		
Lindy Brown	Sean Crowley	Jim Tilley
Tyson Kamikawa	Heather Hannon	TBD
Growth and Learning Committee (6 elected members, 2 annually for 3-year terms)		
Suspended pursuant to Section 4.2 of the By-Laws by Standing Committee vote in February 2020		
Membership Committee (6 elected members, 2 annually for 3-year terms)		
Deb Eiler	Liz Lintz	Sheila Rudolph-Correia
Robin Wolf	Sophia Sid	Susan Woodward
Music Committee (9 elected members, 3 annually for 3-year terms)		
Joan Baldwin	Joi Loewy	Linda Copeland
Lauri Clark	Jack McCreless	Kathryn Maffei
Dirck Stryker	Jayne Zeamer	Carolyn Schatz
Nominating Leadership Development Committee (4 elected members, 2 annually for 2-year terms)		
Phil Coonley	Marilyn Mullane	
Betsy Bowles	TBD	
Religious Education Committee (6 elected members, 2 annually for 3-year terms)		
Karen Caputo	Naomi Magnoni	TBD
Lucille Cannava	Sarah Milt	TBD
Social Action and Outreach Committee (7 elected members for 3-year terms)		
Harris Gibson	Sue Doubler	Gloria Legvold
Claire McNeill	John Healy	Patty Shepard
		Deb Walsh
Youth Advisory Committee (6 elected members, 2 annually for 3 year terms)		
Christine Drane	Patrick Flaherty	Karen Caputo
Jenny Nordan	Michelle Kingdon	Kristine Kamikawa