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WUS - Executive Committee Minutes - DRAFT

4/13/2021 at 10:00 AM via zoom

Attending: James, Fritzie, Judy, Rev. Heather, Thomas and Woody – Sue absent

Minutes

1. Opening Words – Fritzie – You Deserve a Medal – Deliver Us to Evil – Anette Markie [sp]
2. Check in – a sense of understandable fatigue
3. E-Vote on motions – recap below:
 - a. Share the Plate distribution - (Judy Murray)
 - i. “To make \$285.60 from the Share the Plate fund on the balance sheet available to the Social Action Committee for disbursement during the FY21 grants cycle.”) Motion passed unanimously
 - b. Earth Day banner approval – (Marilyn Mullane for Membership committee)

Motion passed unanimously
 - c. WUS signing on to Asian-American statement - (Judy Murray) –

“To add Winchester Unitarian Society as signatory to the town of Winchester’s Select Board’s statement of solidarity with its Asian American and Pacific Islander (AAPI) community in response to the recent attacks in Atlanta.”; Motion passed unanimously
4. Letter of Agreement changes from ERC – there is to be no discussion at SC
5. Employee Compensation Policy update – will be added to SC agenda
6. Annual Meeting Date and Preparations: agree that it will be May 16th – 11:45 AM
 - a. Annual Reports due April 28th - items to be included are reviewed
7. Set Agenda for April Standing Committee meeting – April 21, 2021 - 7pm
 - a. Consent Agenda:
 - i. SC & EC minutes,
 - ii. Staff reports
 - iii. Committee minutes
 - b. Treasurers Financial Update – Sue & Judy
 - i. FY22 Budget – Vote
 - ii. Financial Review
 - iii. Compensation Policy Update
 - c. Volunteers – Fritzie
 - i. Fall survey – Need at least one volunteer from SC to gather a task force and begin drafting. Report back at May meeting.
 1. Ask for suggestions from SC on topics
 - d. Fundraiser – need at least one SC volunteer to round up potential fundraiser organizers and decide on a fundraiser for next year. Report back at May meeting.
 - e. Update on pledge drive - Robbie
 - f. Update on DRE Search Team update– Terry/Heather
 - g. Update on Assistant DYM Search - Ivan

- h. Update on Pandemic Planning – Tech Task Force update (Steve F/ Heather)
 - i. Update on IFPL Environmental Assessment update – Fritzie/Phil Coonley
 - j. Updates on accessible bathroom and landscaping projects – James/Chuck
 - k. Update on Goals Process – a discussion of status and possible strategic planning effort
 - i. Fritzie, Woody and Rev. Heather agree to propose goals for staff
 - l. Vote on General Assembly delegates: Claire McNeil and Rev. Janules; invite SC members to attend GA (virtual), one more delegate slot available.
 - m. Lower Lobby Re-Do: announcement and fundraising? Add to SC agenda
 - n. New Business
 - o. Adjourn
8. Capital Planning – Ask Building Comm to update the list we had and add as needed. Goal: establish Capital Plan by end of FY22 SC year.
9. Marketing and Communications:
- a. Website and Highlights updates – Thomas offer updates
 - b. Marketing: Heather sent out Marketing Task Force FY19 report. Fritzie suggesting we reconvene key parties (Membership, Thomas & others) to review and see what has been accomplished and what we should focus on next. Report back to SC with Action Plan and suggested budget. *Action:* Thomas and Heather will convene meeting with Marilyn Mullane, Kristine Kamikawa, Fritzie Nace and potentially Carolyn Schatz to begin process.
 - c. Evaluate our current communication platforms and develop them to expand our outreach and invitation to the community-at-large. Special attention will be brought to our website for both internal and external communications.
 - d. Marketing and Communications Team will work with leaders in the congregation with events to promote to ensure their publicity materials are engaging, accessible and time-sensitive.

WUS Standing Committee Meeting – DRAFT

March 3, 2021

Minutes by George Wood

Attending: James Pidacks, Fritzie Nace, Rev. Heather, Mike Hyde, Robbie Brown, Patty Cameron, Sheila Puffer, Judy Murray, Patrick Draine, Sue Kiewra, and George “Woody” Wood; Terry Currier; Ivan Corriea

Brad Steele, on budget team, attended through Executive Session for budget presentation.

Notes, Action Items and Motions

1. Opening Words – Patty offered – Donna Ashworth – “History Will Remember”
2. Check in
3. Consent Agenda
 - a. SC meeting minutes
 - b. EC meeting minutes
 - c. Staff reports, committee reports
 - d. Co-Treasurers reports
 - e. Motion to accept consent agenda
 - i. VOTE was unanimous and motion passes
4. Executive session– FY22 draft budget – Patrick, Sue, Judy, Brad Steele
 - a. Motion - Winchester Unitarian Society will provide Life insurance and Long Term Disability Insurance to our employees at or above 750 hours per year who are not already receiving these benefits beginning in the new fiscal year, starting on September 1, 2021.
 - i. VOTE was unanimous - motion passes
 - b. Motion - It is the Personnel Committee’s recommendation that the SC vote on and approve a motion to immediately increase Thomas Slack’s salary from \$51,100 to \$55,000 bringing him to the 57th percentile. This new rate of pay would begin with the payroll period starting on March 21st.
 - i. VOTE was Unanimous – motion passes
5. Budget review – Brad Steele review (see presentation later in this document)
 - a. Revenue and Expenses summary offered
 - b. Discussion on trends with pledges – concerns expressed
 - c. Present trends in membership – concerns expressed
 - d. WUS size designation by UUA has dropped by one category ranking
 - e. Likely need reserves to balance the budget this coming year
 - f. Motion – Budget committee to have meetings with congregation
 - i. VOTE was unanimous – motion passes
6. RE Visioning report as final, publish job role, start interviews - Patty, Terry, Heather
 - a. Motion – Mark the report as final and distribute to congregation
 - i. VOTE – was unanimous – motion passes
7. Update Interim Director of Religious Education – Fritzie and Terry
 - a. Drafting job description which will be brought to SC for approval
8. Update on seeking volunteers for Co-Treasurers, new SC members in spring, fall survey – Fritzie: *Nominating is still looking for Treasurer(s) and 2 additional SC members. The Clerk and Asst*

Treasurer positions have been filled.

9. Goals process - Woody & Heather
 - a. Offer update on COSM willingness to jointly facilitate congregational meetings on goals process
 - b. Meetings will offer update on process and goals proposed and ask for input and report back to SC
 - c. Woody suggest that WUS start a strategic planning process in the near future; the current Mission and Vision statements were drafted about 8-10 years ago;
10. Returning to in-person services and changes to virtual service offerings – Heather
 - a. Tentatively targeting September 2021 [did I hear that correctly]
 - b. Discuss equipment/budget and support needed for virtual access after return to in-person service: *Action - Steve Forcucci on Building Comm will chair a task force to gather information on equipment and personnel needed to accomplish the “wish list” and present to SC. Goal to have system ready in time for September 2021.*
11. Update on pledge drive – Robbie
 - a. 80 pledges so far – pledge drive is technically ended, but the team will begin outreach to those who have not responded. Usually get responses long after deadline. Currently the number of pledges is lower than usual, but the average pledge has gone up.
12. Update on using Google drive, password breach issue - Heather
 - a. Thomas is requesting that all committees use Google Drive to maintain documents so that we have records in a central place that will be passed along to each iteration of the committee. Ryan Levering had done a “tutorial” last year, but we need further instruction. *Action: All Standing Committee members were asked to remind their liaison committees to use Google Drive and to contact the office if they need instruction/help in using it.*
 - b. Password breach: Heather reports that the breach is being looked into more closely to see if WUS needs to do any additional security measures aside from changing the password (done) and notifying the congregation that the online Member Directory must be requested directly from the Church Administrator. A message will continue to run in Highlights, also addressing the email scams using Rev. Heather’s email.
13. New Business
 - a. Associate Director of Youth Education – discuss Job description as presented in DYM Sam Wilson’s Staff to Standing Committee Report for March – needs approval of SC. *Action: SC granted approval and permission to begin the search.*
 - b. Polls – general discussion about whether or not it is ok to ask if people have been vaccinated and is this helpful information in determining any changes to our gathering policies. We were reminded that any decision to return to in -person should take into account those who would like to participate but may not be able to due to health concerns w/ Covid. [were there specifics I missed?]
14. Gratitudes
15. Adjourn

Brad Steele Presentation

WUS FY 2022 Budget Highlights - Income

- Revenue
 - Pledges are most significant annual revenue source for the church
 - Trend: Fewer members year to year
 - Trend: Fewer pledgers year to year
 - Trend: Higher average pledges year to year
 - Question: How is the 2022 pledge drive going? (Must acknowledge 2021 a challenging year)
 - Investment funds (aka Permanent Funds) are 2nd most significant revenue source
 - Trustee recommended giving based on PFs standing on 3/31, typically 5% of prior 3 years average PFs total
 - WUS FY '21 PFs returns should be very strong
 - From 3/31/20 to 3/14/21 Morgan Stanley All World Index up 148%;
 - From 3/31/20 to 3/14/21 Standard & Poor 500 Index up 44%;
 - For 2020 Bloomberg Barclay's US Aggregate bond fund index up 7.5%
 - Building Use (rentals) a distant 3rd, but important revenue source (Chinese school uncertainty; securing their commitment for the fall should be a priority)
 - Fundraiser an even more distant 4th, but we have no identified event or leadership for '22 – yet \$15,000 in the budget.

Trends in Membership and Membership Pledging

Fiscal Year	Members	% +/-	Pledges	% +/-	Total Pledge \$\$	Average Pledge	% +/-	Ave. Pledge per Member	% +/-
2015	283		147		\$ 345,100	\$ 2,348		\$ 1,219	
2016	286	1.1%	145	-1.4%	\$ 355,780	\$ 2,454	4.5%	\$ 1,244	2.0%
2017	286	0.0%	142	-2.1%	\$ 337,700	\$ 2,378	-3.1%	\$ 1,181	-5.1%
2018	268	-6.3%	146	2.8%	\$ 356,200	\$ 2,440	2.6%	\$ 1,329	12.5%
2019	262	-2.2%	145	-0.7%	\$ 357,500	\$ 2,466	1.1%	\$ 1,365	2.7%
2020	244	-6.9%	136	-6.2%	\$ 354,400	\$ 2,606	5.7%	\$ 1,452	6.4%
2021		-13.8%		-7.5%			11.0%		19.1%

WUS FY 2022 Budget Highlights - Expenses

- Expenses
 - Personnel Costs (Typically ~ 72% - 74% of annual church expenses)
 - COLA – 1.7% lower in 2020 than 2019, resulting in approximately \$5,000 less personnel increases in WUS FY '22 budget than FY '21 budget
 - RKM's departure as DLRE providing ~ \$40K savings (timing, predicted lower comp. for new hire)
 - Thomas receiving overdue raise; ~ \$9.5K increase in year over year budget; (no other significant staff salary/wage increases)
 - Overall personnel costs down ~\$10K from FY '21; savings from RE (primarily DLRE position) offset somewhat by increased compensation for substitute ministerial staff during remainder of RevH's sabbatical
 - Contribution to UUA program fund increasing to \$33K; gradually making up 'deficiency' to recommended 10% of annual operating expenses
 - SOC grants level funded at \$17K. This is certainly a discretionary line item expense, but congregation historically strongly supports it.
 - For non-personnel operating costs and committee budgeted expenses, changes from the FY '21 budget could fairly be termed 'trivial.'

WUS FY 2022 Budget Highlights - Summary

- Bottom Line
 - Forecasted FY '22 Operating Expenses exceed Income by ~ \$57K;
 - "Deficit" will be made up pulling \$25K from Sabbatical Escrow account and \$32K from Undesignated Capital Reserve Funds
 - Budget could be fairly characterized (in words of JM) as a "Kick the can down the road" budget
- What should keep the SC members awake at night
 - Will pledge commitments approach recent averages, much less pledge committee's ambitious goal?
 - Will Chinese after school program come back?
 - Can we agree on a FY '22 fundraiser, and find someone/somebodies to lead it?
 - Will RE 'savings' really materialize, especially given ambitious agenda of Visioning Group?
- Not all Doom and Gloom
 - WUS has a much larger 'endowment' than churches of comparable size and the past 11 ½ months have seen some of the highest market returns in recent years
 - Numbers of members and pledgers are down, but the average pledge amount is up (and this is true of pledges received to date for FY '22)

March 2, 2021 Minutes

Centering Thought: “Create something that makes the world **AWESOME**” Kid President

Programming

Remote RE

2020-2021 (Pre-K - 5th grade)

- **Gather feedback:** How is what happening now working? (Naomi sent out email as well)
 - Family Worship : works for more than 2 families always and 3 other families sometimes; no other option has worked well yet and most people are not responding to our email or highlight requests for feedback
 - First Reflections: great for those who responded but would like the story to be concrete. If too abstract, when you're not in person, the kids get lost really fast. On the other hand, the parachuting kitten story is still talked about.
 - Mostly the feedback is only coming from the 3 families who are currently on the RE committee.
 - In April, hopefully we will be able to get more feedback as we meet in person at the church.
- Pivoting into a Potluck Theology geared for all ages.
 - Make Valentines for the Community for February 7th: This event went well. We have not heard from Valentine recipients but those making the valentines enjoyed the process.
 - March 21st Egg Dying 4:30-6:00
 - Rebecca has put it in Highlights and Announcements
 - Rebecca can provide some limited decorating materials (stickers etc.) but not dye and eggs (bring your own eggs and must be able to zoom). Pick up materials at the church in bins outside the front door.
 - Naomi reserved the zoom link with Thomas but will not work for that day so we will try Rebecca's link and use Rebecca or someone as the bouncer who filters people into the breakout room. The program will take place in a breakout room to keep people from posting unnecessary images.
 - Theology- March theme is “Becoming” Rebecca will coordinate with someone who volunteered at the Cottage Meetings but cover Equinox, the symbols of spring, new beginnings and all of that stuff and from the groundhog coming out of its cave to the eggs being born to the multiplying bunnies and, all of the symbols that we associated with spring as well as their pagan roots.

Note: Broke into 2 groups. One to focus on 6th-8th grade & OWL; the other to focus on Pre-K-5th. Rebecca was asked to be with the older group until the Crossing Paths & OWL needs were addressed. Erin will be leaving soon and who will have a child OWL aged was asked to join the older group as well. This division was not great and did not help us accomplish more. May work on other topics in the future but not now.

2020-2021 For older kids grades 6-8th & Plan A For 2021-2022

- **Crossing Paths:** Update
 - This is really needed and thank you. Still working for one WUS family.
 - First session on Buddhism. Talked about the Kami, which are elemental spirits which lead to the suggestion of watching Spirited Away movie on their own. The movie was discussed for the Shinto session and Naomi added to our Booklist & Website Educational list https://docs.google.com/document/d/1hS8HYiDXwP1JTJQWheS2AVuawCq1Se_TctiGOvHMq-8/edit
 - three kids who show up regularly (the WUS teenager was the only kid who showed up this week and one of our leaders was moving) There is a wish like everything else that's happening this year that it worked better for people and would be more populated in terms of the Chicago and WUS folks
- **For Next Year:** it would definitely be a zoom type class so...(2021-2022) Rebecca, what did Chicago say about next year?
 - If kids are in school and maybe zoom will be attractive
 - It isn't going to lend itself to hybrid.
 - There's no firm answer right now and like so many other things is just kind of wait and see.
 - The neighboring faiths element though, the education piece works really well in this because we can just show them so much more for example, clips from different religious practices. If we went on an in person visit, it's really hard to arrange at 10 to 12 on Sunday morning. If we have a partner, it would be a good idea to think about using some of the elements, what we've done this year for faith physics.

2021-2022 OWL

- Plan for next year teachers 4 unpaid. In the past, we have had the volunteers teach for 2 years and have a year off in the past. Need four leaders for OWL; Rebecca usually recruits the trained leaders and puts together a team; usually asks last year's leaders and people teach 2 years or so in a row; Rebecca- this month start recruiting four teachers for next year with the idea that we will be starting the small group gatherings (including OWL) when we get the ok.
 - Rebecca is contacting the congregation's people from churches. Churches near us might want to get together with Winchester for learning. We'd want them to send a teacher because we're not in their community. If we don't get any buddies who might absorb our kids in on their OWL.
 - Teachers as three on committee and then some others who are on the bench.
 - Start date early or late winter: Would prefer to start in October or January (fewer sessions that would go to May). No date set yet.
 - **Before we can start promoting OWL programming for next year.** Wait until we choose dates October & have Teachers
- Who is OWL for 2021-2022?
 - 2019-2020 who didn't quite finish OWL but wish to. They missed consent, making decisions, relationships, which is covered in WUSYG.
 - The catch up year after COVID will look different. So could include 8th graders.

- Reach out to WUS Members those 7th graders and 8th next year plus the list that was started with those interested in the program since Covid started.
- Promoting after decision teachers chosen, location selected & time locked in.
 - Wish to reach out to students in spring.
 - Karen suggests posting on Winchester FaceBook page.
 - We want to offer it outside of Winchester. It is opened to all, but we have limited resources.
 - Terry volunteered to post on FaceBook.
 - Karen can post on the Stoneham page.
 - Don't forget to reach out to the person who contacted Rebecca after the Parent to Parent program last fall (Excel spreadsheet of contacts on shared drive).<https://docs.google.com/spreadsheets/d/1LxmeDaSiAkPMwLoJt5lVIGTowSzdwhbumzrTTWHmcME/edit#gid=0>
 - reach out to all 2019-2020 OWL participants
- Building committee has been working on a better air circulation as there are concerns for making sure the ventilation and the quality of that room is good for students who will be in there for two hours.
 - Sarah will follow up with the ventilation experts on site.
 - There may be a project to address the HVAC system in the chapel, which should organically make it more ventilation friendly. So if we conclude that Wallace is not going to work in terms of ventilation, then the chapel might be another option. When we have next month's meeting, most of the pieces will be in place to make a decision. We may know who the teachers and/or the other congregations to figure out how we're going to potentially promote, so that we can promote before May or June. June at the latest.
- Should we charge? Balance- need to show importance so that participants return for all the sessions, but don't want to make a barrier; We feel it is more important to have participants than charge money.

Brainstorm: Summer & 2021-2022 Pre-K-5th or 6th:

- Plan five different things for summer for kindergarten through fifth grade, and depending on what it is, if older children want to join in. We can alter it to meet whoever those needs are. We have so few comers that need to be group directed after initial visits (both child and adult)
- Possibly send out a survey like last year. We can reach out to more people perhaps as we are doing it earlier.
- Envelopes/packages could be created with collaboration with Rebecca before we are through
- meetups for watering the flowers,
- terrarium depending on how it goes if can't fit in the spring
- From our priorities: CURRICULUM/CONTENT Transmit faith's traditions, symbols, theology, history, heroes, values, and practices
- we want to give an opportunity to build community, and we want the golden rule to be there, bringing your best self that invites you to practice forgiveness, and practice, honesty and those kinds of things.
- doing gardening

- suggest we have community members, and at least one parent there to be with the kids. So there's at least two people at all times with the kids.
- going to split them up in the age groups depending on number which would need more supervision.
 - we already have a list of community members who are interested in helping out.
 - Not decided that we're going to use some teenagers, but would like to in the fall teen AIDS: probably only one or two that are still in high school. Which we must receive Standing Committee approval before going forward
- sense is that the aim is to hire the DRE person to start working early August,
- RE kickoff in September date known before June? Choose date for the welcoming committee that we usually do mid September. And then one or two other things after that, and then that's it. The Interim RE employee can take it from there with collaboration from us.
- the visioning team is supposed to come up with a final, final draft based on the feedback they received from the cottage meetings.
- Let standing committee know may only have one or two teams needed for the fall for teen/volunteers to run the RE groups as we have few PreK thru 5th/6th, and then it might be a volunteer that's an adult volunteer with the team.
- Terry will both reach out to the visioning and standing committee regarding the teenage kids. We know that we will also have to have adult volunteers. But we are still very much in the brainstorming and I'm going to bring some of that brainstorming over. It does look like we will try and do some of the summer, similar to like last year but there'll be things that are changing, and in the fall, will probably only be programming into October, so that whoever comes on in August, will know what happens for the beginning, as long as people are okay with that.
- **RE Volunteers from Cottage Meetings:** Thank you so much for the cottage meetings. During the summer and into the fall, before we get the new hire, or if it takes longer to work out then we will come up with whatever it happens to be. With that in mind, and the priorities that we took from 2018, and a discussion from next month.
 - An extra adult might be enough to make the parents feel okay with taking a breather.
 - Pat Cameron: Will teach
 - Vicki Cocoluto: will do "something" with younger kids, if she has another person/people to work with racial justice
 - Carole Delaney: Offered to do Wright Locke farm/outdoor ed
 - Deb Walsh: Will help out with family worship
 - Claire McNeil: will offer childcare
 - Margaret Lowry: gardening with children - time frame?
- Summer
 - July: 2-3 times in person meetups
 - August: 2-3 times in person meetups
- Fall
 - Teen Aids: waiting to hear back from Visioning &/or Standing Committee
 - Juanita
 - Adult Volunteers

- Set up to at least the beginning welcome from
- Remote & in person?

In-Person RE (Pre-K - 5th grade): 5:40ish

- Sunday picnic/gatherings
 - Kick off the spring event: Can good hunt April 4th 12:30 to 2pm
 - Rebecca will put blurb in Highlights & Announcement invitation is open to all kids, regardless of age. Anybody can come.
 - Use basket outside for food pantry items. Naomi will email Thomas to confirm where the cans can be stored and will put them into plastic containers
 - Hide by Volunteers (Naomi will send an email to Sam to see if WUSYG could help but they may not be able to do it) be mindful about when the ground is muddy.
 - Put in highlights a request for cans and non perishables. Do not bag anything because as we learned that the squirrels are rapacious and dig into the sunflower seeds or whatever.
 - Naomi will send a thank you to social action & Thomas for the awesome coordination this year with canned food.
 - Heather is happy to join you and in hiding cans and rejoicing in them being found
 - Bunny (goodie) bags.
- Should we add one more? We are ready for outdoors!
 - gardening terrarium set up as an idea for in person.
 - could probably do a trail outing. In April, because you don't have to sit on the ground

Leader Transition: Rebecca Leaving in June/August

- Thank you: The visioning team that has set a firm foundation to begin the hiring process for a new position that may be more sustainable for our changed community. I thought the visioning committee was over. I'm sorry that you guys are not the amount of work you guys are putting in this is like, so enormous that I can only thank you and thank you and thank you.
- Hiring an interim DRE team. This will become a monthly item to keep us in the loop.
 - Sarah Milt (RE)
 - Lucille Canava (RE)
 - Terrill Levering (Parent)
 - Terri Currier (RE)
 - Tyson Kamikawa
 - Rev. Heather
 - Sam Wilson, DYM
 - Thank you to all the people who've decided to be part of the hiring committee of the interim dre. Ryan, Could you let Terrell know we appreciate her time.

Yearly Business :

- Submission for annual report: April date?
<https://docs.google.com/document/d/1xF5Z0IPw0nI3VoitvscI8hBvBr0EOfqGGB6Jns0X77k/edit>
- Recruit for next year RE Members: space for Erin & Ryan open plus Karen's too?
 - Naomi will send out an email of the list of parents to the nominating committee.

- we need parents hopefully because Naomi will be the only parent left who has kids in that age group unless of course..
- what often happens is a committee will throw around some names that they think would be a good fit for what they want to do and they might share that list with nominating and nominating might have some names to add to that list as well so there's kind of a back and forth about who to bring on, and I'm sure nominating would welcome some suggestions.
- hand them the list of the parents because there are so few families if we want parents they might be good candidates
- looking for non parenting adults need a well connected non parent
- It should be like a 50/50 type of collaboration.
- Request for Juanita Simms and teenagers back in the fall to help with childcare/playroom Would like to keep Juanita for the Juanita (playtime during the service) continuing with her in the summer unless somebody says anything differently. historically we haven't always had childcare over the summer
 - The question has been raised about whether our model of using teen teachers is in line with the safe congregations policy. The Standing Committee will sort that out.
 - With the new staff person, it would be helpful for us to know what resources are at their disposal.
 - The person that is selected by the search committee may encourage us to go into a different direction but we don't know.
 - Terry is going to be going to the standing committee with this
 - Erin will send to Terry & Naomi more info on safe congregations. there's actually a lot of training there. So that might be a thing to put out there as far as if we're going to be having all these volunteers, and maybe even getting the teenage trained with that, training, and there's also there's a program that manages it all

Winchester Unitarian Society
 Building and Grounds Committee
 Zoom Meeting Minutes
 March 15, 2021 7:00 p.m.

1. Recently completed projects
 - a. Braiding end cap on bell pull rope – Completed by Matthew & Tyson. A beautiful job that will be appreciated for decades.
 - b. Fix broken urinal flusher in ground floor men’s room – Used this small job to tryout a new plumber suggested by Randell Drane. Job was done well and affordable so, we have a new vendor to call on for small jobs.

2. Update re on-going projects
 - a. HVAC upgrade for sanctuary, Symmes and chapel –
 1. Project started 3/8 and will take about a week
 2. We are learning a great deal about the church’s zones and boiler control from the contractor, more to come on that.
 3. Steve Milt’s new sensor being tested in Nursery School was moved to the Sanctuary in advance of the 4/17 concert to establish a CO2 baseline
 - b. Music Directors office front of sanctuary –
 1. The base cabinet is ready and the custom shelves Joe is building are nearly done
 2. With John’s agreement an additional cabinet (currently in the lower lobby) will be moved into the Music Director’s office to replace the old desk to provide more music storage space
 3. John K. to make the office ready for transition before the move in
 - c. Donor funding ground floor accessible bathroom –
 1. After some discussion the location & plans for the bathroom were approved by SC
 2. The final drawings have been completed & the contractor is getting the permit
 3. Our sprinkler vendor is being asked to provide a quote on adding a new head above the bathroom
 - d. Additional sound absorption panels in Metcalf – James to complete when he has the time
 - e. Water damage in dungeon, Sam’s WUSYG storage request –
 1. Dungeon has been completely emptied, well over 50% thrown out, and the rest is in Chapel to be reviewed before being returned or discarded
 2. The bad portion of ceiling has been removed to be redone by Joe C. morning sexton
 3. An active radiator found was found in the Dungeon, so a new TRV controller added to keep it getting no more than just warm

3. To be addressed
 - a. Outlets in front of Chapel – Will be addressed as part of longer list for electrician
 - b. Wallace heat & HEPA filter request from REC for OWL – REC requested HEPA air purifiers as well as reliable heat for Wallace to enable OWL in person next fall. BGC agreed to the purchase of two HEPA air purifiers for use in Wallace and for the 41/7 concert in the Sanctuary.

The 'reliable' heat will be addresses as part of the improved heating controls project mentioned below.

c. Refurbish Vestibule and downstairs bathrooms – Re-Do is generating options to upgrade the look and feel of the lower lobby post the addition of the new bathroom. Chuck & Joe C. re-wired the antique light fixture to allow additional bulbs and it dramatically adds light to the space. Joe has been asked to do the same with the two sister fixtures on the main floor.

d. Figure out how heat monitoring and control in general – While Chuck is recharting the heat zones, Tyson is investigating options for using smart thermostats, more to come

4. Grounds

a. Donor funded MVP side, major landscape upgrade status – Funding in place, contractor on board with final quote. Work to begin as early as May

b. Funding needed for Chapel walk upgrade – Chuck to figure out

5. Projects not to be forgotten but on hold for now

a. Future exterior painting (wood trim and windows)?

6. Larger items to remember for capital campaign:

a. Refurbish Metcalf Hall

7. Other business?

a. The loose bricks at the back entrance to be tackled by the Sextons

8. Next scheduled meeting Monday, April 12th

Membership Committee

DRAFT

Thursday, March 18, 2021

In attendance: Marilyn Mullane and Robin Wolf, Co-chairs; Rev. Heather Janules, Naomi Delairre, Deb Eiler, Gloria Legvold, and Sophia Sid

Check-in

Opening was a reading by Dr. Galen Guengerich from All Souls Church

Bring-a-Friend Sundays:

April 18 “The Good Place”:

-Please be sure to mail your postcards on April 1.

-If you haven't submitted reimbursements for stamps, please do

-Pulpit announcement to broadcast on the April 11 service: Prior to that Naomi and Deb will do a pre-recorded announcement, and will schedule a zoom meeting with Heather to record it. Format will be in a scenario of a phone call, e.g.

N: Have you seen the Good place?

D: No, I haven't, what's it about...

N: It's this... that with their emphasis being to bring a friend to this service

-Sophia will create a blurb and e-invite this week to include in highlights

May 23: Bring-A-Friend Youth Service

Marilyn will get the Youth to do a pulpit announcement on May 9 and someone from Membership to do Highlights on May 6, 13, and 20

Heather mentions that May 9 may be a “on the road” so we may need to revisit this

Banners: Kristine created a beautiful banner for the 7th principle that is currently displayed for the first day of spring. The Earth Day Service is slated for April 25 and Kristine will create one specifically for Earth Day. Remaining banners for principles 1,3,4, and 6 are deferred until next church year.

Discussion on the Membership Budget: It was decided to keep the budget at

\$1,800: A review of our past budget expenses: 2 banners is \$500; 2 mailings: \$280; 2 spaghetti dinners: \$276 so at a minimum whether doing 2 banners and 2 mailings, if virtual, or 2 banners and 2 dinners, if in person, the amount is roughly \$856 not counting other expenses like welcome breakfast, new welcome brochure and New Member Sunday with refreshments and roses, etc.; the Committee agreed that next church year will be a big year for rebuilding after the pandemic, both in terms of engaging current members and attracting new visitors. Thinking of budgetary concerns for the year ahead, Heather reported back Covid-planning and on the possible reopening of WUS. While it could be possible to reopen in the summer, since summer services are volunteer-lead, they are thinking instead of having re-opening during Water Communion on August 1. Thinking between now and August 1st church planning will need to retrofit the building to conduct services in a hybrid manner; In person and virtual at once. The hope is the

welcome everyone back at the beginning of September. Membership did approve submitting a budget request of \$1,800.

Visitor log: No new visitors to report.

Bench-marking follow-up:

Follen: Heather will follow-up with them to get their Faith Forward curriculum

Carlisle: Minister reached out to Rev. Heather afterward our zoom joint meeting with Membership & their RE director; Much of what they are doing for the RE Program and Membership is similar to ours. They are focusing on creating connections with their visitors and new members; Their membership chair reached out a few times to new members to ask how they are doing and if there is anything that they needed. They did do a membership class this past fall virtually and it was just one class. In speaking with their Rev. the program for the class was very straightforward about the different committees and how to make a pledge. While there isn't any specific marketing that they do to increase and attract families, it is more a culture, and a focus of everyone being interested in families. They strive to foster intergenerational relationships. From this Gloria mentioned that she was once paired to mentor to 7th Grader and found it very rewarding that they still keep in touch. Perhaps something to keep in mind.

We discussed the possibility of a joint Membership/Fellowship event in the Spring; Perhaps an outdoor picnic in May either on a Saturday 9-12pm or Sunday after church? Sophia will reach out to Tyson, head of Fellowship to inquire. We also need to be certain to connect with visitors and prospective members prior to our April meeting.

Possible New Members:

If you need addresses of visitors, the list is here:

<https://docs.google.com/spreadsheets/d/1g9WIX8vgrKz0xh40shzTnZp3lyeFW7U2uhVMQHQdR08/edit#gid=0>

If you need the latest Membership Directory, please email Thomas directly at the office at: office@winchesteruu.org and he will send it to you.

Karen Hirschfield: now lives in Beverly and wants to connect with the UU church there once it reopens. While she feels connected to WUS, few singles her age is a drawback. Marilyn spoke to Lindy (who is on Green Sanctuary) and Roofus (who is on YAC and does youth service trip). They like their current level of involvement.

Marilyn reached out to Carolyn Schatz; Karin Sangster & Umar Mahmood; Lauri & Travis Clark all by e-mail and did not receive any response.

Kathy Howard: Naomi will reach out to her

Dianne Leslie-Mazwi – Deb will reach out to her

Diane	Leslie-Mazwi	2/16/2020	3 Churchill Circle	Winchester	01890	hdmazwi@gmail.com
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Anne Miller: Sophia will reach out

Nancy Schrock: Gloria is in touch as friends. Nancy is still in California and so she would like to wait until she returns

Dianne Chabot: Naomi will reach out

Mary English: Friends with Naomi; she was interested but not ready to commit; believes that we should wait until we are able to congregate again in person

Brochure: With our budget spent for this church year and awaiting a new RE Director, we will wait to reprint our brochure until the fall. Looking over suggested changes; re: the green box on the panel of Who we are: We should be honest on the number of states; Don't say Zoom, but instead virtually. On inside panel: Should we say Adult education with change in RE Director? Perhaps spiritual growth instead? Perhaps we should rethink the "quote" from the kids. (Maybe just take off the quote signs?)

In terms of new photo's, it was suggested that we use the BLM photo on our front lawn for one of the larger photo's inside the brochure because not only does it speak to our values but illustrates that WUS is the place to go for vigils, protests, etc. Per Marilyn, if changes are tweaking text and updating photo's, then Membership has the authority to reprint. If instead wholesale changes are contemplated, she suggests running it by the Standing Committee, as a courtesy.

Follow-up on Racially Inclusive Brainstorming: we were asked to reach the compilation of brainstorming ideas from our January 21st minutes to determine which ones might be easy and most impactful to do. Some of the bullets that members suggested:

- Invite the Youth in the ABC group, our youth and the WUS Community for an event with all in the fall
- Have another co-church service
- Have a speaker such as Jon Swann come as a speaker; This is good as we can also invite the Winchester Star to do an article or advertise an event like this.

Update on the Nominating & Leadership Development Slate

Liz Lintz & Sheila Rudolph Correia will join as new Membership Committee members for next year. However we need one additional. Marilyn suggests Susan Woodward as a new member, and feels that its good to have a new member fresh perspective and experiences.

Closing reading:

"A light exists in Spring" Poem by: Emily Dickenson

http://www.yourdailyoem.com/listpoem.jsp?poem_id=300

END

Respectfully submitted by Sophia Sid

YAC Meeting Notes

March 18, 2021

- Check-in
- Update on ADYM Search
 - Job posting has been finalized and advertising role will begin soon
 - Goal is to hire someone by the service trip if possible (by April 21-23) so we ideally have some overlap with Haley and new ADYM
 - If we decide to have more in-person meetings post-April vacation, the new person would be starting
- Update on service trip
 - April 21-23, food justice theme, not sure how many youth will attend
 - Nailing down chaperones and partnerships this week
 - Will have youth confirm attendance by April 1
- Discussion on in-person meetings, etc.
 - First in-person meeting of the year is coming up this Sunday, March 21!
 - Do we want to shift back to in-person (outdoor) meetings?
 - Post service trip, yes
- Updates and discussions on Young Adult Ministry
 - New idea for expanding youth and young adult ministry
 - WUSYG - High school
 - WUSJYG - Middle school
 - WUSEA - 18-24
 - WUSYA - 25-35
 - Sam and Haley working on gathering input and ideas for what this programming might look like (especially for WUSEA and WUSYA) per meeting with Fritize Nace, James Pidacks, and Rev. Heather to brainstorm what we want our programming to look like long-term
 - DRE replacement and the direction that goes will impact the future of Sam's role and who does what
 - Groups will be fostered/guided by leader, not just self-led
 - Idea: Larger thing paired with other local UU communities - Greater Boston Young Adult UU
 - WUSYG facebook groups → WUSEA and WUSYA groups (pending interest indicated on survey)
- **Next meeting: Thursday, April 15 7-9 pm**

PERSONNEL COMMITTEE – March 31, 2021

Attending via Zoom: Pete Baldwin, Sue Kiewra, Kathy Richardson, Heather Janules

1. Standing Committee actions on Personnel Committee recommendations from March 4 meeting:
 - a. Approved increase of Thomas Slack's salary to \$55,000 to bring him to the midpoint of the UUA range for his position, effective immediately. A letter documenting this is in process.
 - b. Approved lowering from half-time to 750 hours/year the minimum FTE for which WUS will pay the premium for life and long-term disability insurance, effective September 1, 2021. Thomas is pursuing with the UUA the steps we need to take to make this happen for the two employees affected.
 - c. Received without action the recommendation to lower from half-time to 750 hours/year the minimum FTE for which WUS will pay a portion of the premium for health and dental insurance, effective when the budget permits.
2. Job descriptions: Heather will make sure we receive the final versions of job descriptions for Interim DRE and Assistant DYM to be added to the committee's Google Drive.
3. Computers and phones: Discussed need for a policy on covering costs of computers and phones used by staff. Should devices be provided or an allowance for purchase and related expenses given? If staff have one device for personal as well as work-related use, how is personal information kept private? Pete will draft language for a policy. Included in the discussion was the need for staff to know where to go for technical help.
4. Heather to follow up with Thomas on status of staff request for training in use of Google Docs.
5. Heather is working with Rebecca to make sure that WUS materials in her possession – on computer or on paper – are left for her successor. Heather will ask Sam to make sure he follows a similar procedure with Haley.
6. Recommend the following language in relevant letters of agreement:

Salaried:

This position may require your participation in service trips and/or overnight events such as retreats. Although there is no additional compensation for your participation in these events, the church will pay your expenses (normal costs of transportation, food and lodging) and they will not be charged against your professional expense allowance. You should work with the other adults involved with the event to make sure that you have some "down time." It is understood that even when you are not one of the primary adults who is "on", you will be present and available as needed. After the event you should take some days off, the number and timing to be worked out with your supervisor.

Hourly:

This position may require your participation in service trips and/or overnight events such as retreats. You will be paid for 8-12 hours in each 24-hour period, the exact number depending on the nature of the event and the number of other adult volunteers. This should be agreed upon in advance with the possibility of adjustment for unforeseen circumstances. In addition, the church will pay your expenses (normal costs of transportation, food and lodging). You should work with the other adults involved with the event to make sure that you have some "down time." It is understood that even when you are not one of the primary adults who is "on", you will be present and available as needed.

7. Recommend the following in all letters of agreement as well as in the Personnel Policy Manual:
As a religious institution the Winchester Unitarian Society is exempt from participation in some state-administered programs such as unemployment insurance and the Paid Family and Medical Leave Program, and employees are not entitled to collect benefits from those programs based on earnings at the Society.
8. Tentatively approved draft Salary Review Procedure. Sue to incorporate suggestions and circulate for final approval before it goes to ERC and Executive Committee.
9. Book of Everything = operations manual
 - a. Thomas, Jenny, Sue, Judy and Kathy met to discuss scope. B of E is reference for anyone who has to handle administrative tasks – what, when, how, where to get help.
 - b. Thomas is working on filling in the calendar of tasks. Keeping it up to date should become part of his job description.
 - c. Kathy to figure out where B of E belongs in the schema for church information.
10. Architecture/schema for church information: Kathy to continue listing data to be included, then organize.

Next meeting: Wednesday, April 28, 9:30 a.m.

Pending items:

- Computer section of policy manual
- Personnel database – see Pete's email of Feb. 17
- Minister's time off

YAC meeting notes 4.15.21

Check in

Chalice lighting

Looking back

- Still doing meetings on Zoom and had one outdoors recently with slightly higher attendance
- Zoom attendance is dwindling as expected

Looking forward

- Young Activists Camp (& help with dinners)
 - 20 people registered now
 - 11am-8pm
 - We 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
 - Will have an environmental justice day (service), racial justice day (public witness), and lgbtqia justice day (advocacy) (education on all days!)
 - Each theme will be 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
 - They’ll provide their own lunches, we’ll buy dinner and snacks
 - Heather and Rebecca may join for parts
- Sweatshirts
- Young Adult Ministries
 - Upcoming meeting with recent grads
 - Survey went out to alums and older young adults to get a sense of interest in WUS-related programming/group things
- ADYM Search
 - Job has been posted but not much interest expressed yet
- In-person meeting this Sunday!
- Camp dinner pickup help?
 - Christine will help with Wednesday
 - Jenny will do Thursday
- Exec biz: committee members, annual report
 - YAC next year - Kristine Kamikawa and Michelle Kingdon expressed interest, as did Karen Caputo
 - Roofus & Patrick are on 3rd term but agreed to stay on again
 - Marcy is probably going to join Standing Committee and will be YAC liaison

Next meeting date: Wednesday, May 12 at 7:00 pm

From: Judy Murray and Sue Kiewra
Date: Saturday, April 10, 2021
To: WUS Standing Committee
Subject: Month-end financial reports for March 2021

Dear Standing Committee members,
Happy Spring! We encourage you to review the Budget vs. Actuals Report for FY21 and Balance Sheet as of March 31st.

On the Budget vs. Actuals report:

- We have an operating surplus of \$177,980.45.
- In Income, the nursery school has paid its full rent for the year.
- In Expenses, we are 7 out of 12 months through the year or 58%. Sabbatical ministry expenses were under budget by \$6K. Because the building is closed, spending for Building and Grounds is low. Snow removal was \$2K under budget. Staff professional expenses have been minimal due to COVID's impact on trainings and conferences.

On the Balance Sheet:

Money market accounts 1060 and 1080 are where we're keeping approximately \$100K in donated big project money to earn higher interest until bills for project work are submitted for payment. Chuck and Julie Khuen are working hard to have these projects completed before the building reopens for in-person gathering.

We continue to be in great shape this fiscal year due to the forgiven PPP loan and the amazing Auction Fundraiser.

Other news:

- Health insurance rates for Thomas and Heather are going up by 10% beginning in July.
- The Budget team (Patrick Draine, Brad Steele, Sue Kiewra, Judy Murray) continue to revise the FY22 budget as new information comes in. Congregational preview meetings are scheduled for 4/12 and 4/14. After reviewing feedback, SC will be asked to vote on the version to be presented at Annual Meeting for a vote. 4/10 draft version shows a deficit requiring \$22K from the Undesignated Reserves fund to close the gap. This is excellent news.

Questions and comments welcome.
Judy and Sue

Winchester Unitarian Society
FY21 Budget vs Actuals
September 2020 - March 2021

	Total			
	Actual	Budget	over Budget	% of Budget
Income				
4100 Individuals				
4110 Current Year Pledges	258,203.24	340,000.00	-81,796.76	75.94%
4150 Prior Year Pledges (Late Payments)	19,730.00	12,600.00	7,130.00	156.59%
4160 Contributions - non-pledge	7,353.00	9,000.00	-1,647.00	81.70%
4170 Sunday Collection - non-pledge	8,387.30	13,000.00	-4,612.70	64.52%
4180 Sunday Collection - Share the Plate	11,278.30	15,000.00	-3,721.70	75.19%
4190 Electronic Funds Fees	-1,385.63	-1,800.00	414.37	76.98%
Total 4100 Individuals	\$ 303,566.21	\$ 387,800.00	-\$ 84,233.79	78.28%
4200 Investments & Endowments				
4210 Bank Interest	1,594.80	2,500.00	-905.20	63.79%
4220 Downs Income	9,255.00	12,340.00	-3,085.00	75.00%
4230 Meyer Income	33,600.00	57,600.00	-24,000.00	58.33%
4240 Trustees PermFunds - Unrestricted	48,000.00	96,567.00	-48,567.00	49.71%
4250 Trustees PermFunds - Building	716.15	716.00	0.15	100.02%
4260 Trustees PermFunds - Cook Funds	7,310.70	7,310.00	0.70	100.01%
4265 Trustees PermFunds - Baldwins Fund	2,373.20	2,373.00	0.20	100.01%
Total 4200 Investments & Endowments	\$ 102,849.85	\$ 179,406.00	-\$ 76,556.15	57.33%
4300 Building Use				
4310 Winchester Coop Nursery School	30,870.00	30,870.00	0.00	100.00%
4340 Other Building Use	450.00	2,000.00	-1,550.00	22.50%
Total 4300 Building Use	\$ 31,320.00	\$ 32,870.00	-\$ 1,550.00	95.28%
4400 Other Sources				
4410 Fundraising	32,406.53	10,000.00	22,406.53	324.07%
4420 Concert Series		8,000.00	-8,000.00	0.00%
Total 4400 Other Sources	32,406.53	\$ 18,000.00	\$ 14,406.53	180.04%
Total Income	\$ 470,142.59	\$ 618,076.00	-\$ 147,933.41	76.07%
Gross Profit	\$ 470,142.59	\$ 618,076.00	-\$ 147,933.41	76.07%
Expenses				
5000 Staff				
5100 Ministerial				
5110 Lead Minister				
5111 Salary	39,956.98	104,301.67	-64,344.69	38.31%
5112 Housing	20,192.25		20,192.25	
5113 Benefits	11,970.23	30,942.45	-18,972.22	38.69%
5114 In Lieu of FICA	4,576.91		4,576.91	
5115 Professional Expenses	2,538.58	10,400.00	-7,861.42	24.41%
Total 5110 Lead Minister	\$ 79,234.95	\$ 145,644.12	-\$ 66,409.17	54.40%
5119 Substitute during Sabbatical	3,720.00	10,000.00	-6,280.00	37.20%
5130 Summer Minister		2,153.00	-2,153.00	0.00%

	Actual	Budget	over Budget	% of Budget
5140 Sunday Speakers	364.62	1,000.00	-635.38	36.46%
Total 5100 Ministerial	\$ 83,319.57	\$ 158,797.12	-\$ 75,477.55	52.47%
5200 Administration				
5210 Administrator				
5211 Salary	29,262.94	51,100.00	-21,837.06	57.27%
5212 Benefits	9,938.84	18,718.15	-8,779.31	53.10%
5213 Professional Expenses	195.00	1,000.00	-805.00	19.50%
Total 5210 Administrator	\$ 39,396.78	\$ 70,818.15	-\$ 31,421.37	55.63%
5220 Administrative Assistant				
5221 Salary	12,768.94	20,600.00	-7,831.06	61.99%
5222 Benefits	980.64	1,575.90	-595.26	62.23%
Total 5220 Administrative Assistant	\$ 13,749.58	\$ 22,175.90	-\$ 8,426.32	62.00%
5230 Sextons				
5231 Salary	21,534.70	37,527.55	-15,992.85	57.38%
5232 Benefits	1,656.95	2,832.61	-1,175.66	58.50%
Total 5230 Sextons	\$ 23,191.65	\$ 40,360.16	-\$ 17,168.51	57.46%
Total 5200 Administration	\$ 76,338.01	\$ 133,354.21	-\$ 57,016.20	57.24%
5300 Religious Education				
5310 Director Religious Education				
5311 Salary	40,441.34	67,402.47	-26,961.13	60.00%
5312 Benefits	9,866.46	16,918.07	-7,051.61	58.32%
5313 Professional Expenses	816.47	4,500.00	-3,683.53	18.14%
Total 5310 Director Religious Education	\$ 51,124.27	\$ 88,820.54	-\$ 37,696.27	57.56%
5340 RE Program Assistant		813.83	-813.83	0.00%
5350 RE Teachers and Aides	619.89	4,255.42	-3,635.53	14.57%
Total 5300 Religious Education	\$ 51,744.16	\$ 93,889.79	-\$ 42,145.63	55.11%
5400 Youth				
5410 Youth Director				
5411 Salary	22,760.13	39,405.78	-16,645.65	57.76%
5412 Service Trip Stipend		2,000.00	-2,000.00	0.00%
5413 Benefits	4,797.90	8,862.86	-4,064.96	54.13%
5414 Professional Expenses	663.01	2,000.00	-1,336.99	33.15%
Total 5410 Youth Director	\$ 28,221.04	\$ 52,268.64	-\$ 24,047.60	53.99%
5420 Youth Assistant				
5421 Salary	3,286.11	6,281.21	-2,995.10	52.32%
5422 Service Trip Stipend		2,000.00	-2,000.00	0.00%
5423 Benefits	253.30	633.51	-380.21	39.98%
Total 5420 Youth Assistant	\$ 3,539.41	\$ 8,914.72	-\$ 5,375.31	39.70%
Total 5400 Youth	\$ 31,760.45	\$ 61,183.36	-\$ 29,422.91	51.91%
5500 Music				
5510 Music Director				
5511 Salary	22,551.44	39,089.09	-16,537.65	57.69%
5512 Benefits	4,343.15	7,687.26	-3,344.11	56.50%
5513 Professional Expenses		2,150.00	-2,150.00	0.00%
Total 5510 Music Director	\$ 26,894.59	\$ 48,926.35	-\$ 22,031.76	54.97%
5520 Children's Chorale Director				

	Actual	Budget	over Budget	% of Budget
5521 Salary	2,026.00	3,100.32	-1,074.32	65.35%
5522 Benefits	146.48		146.48	
Total 5520 Children's Chorale Director	\$ 2,172.48	\$ 3,100.32	-\$ 927.84	70.07%
5530 Soloists and Section Leaders	9,422.65	14,155.98	-4,733.33	66.56%
5540 Other Musicians		2,000.00	-2,000.00	0.00%
Total 5500 Music	\$ 38,489.72	\$ 68,182.65	-\$ 29,692.93	56.45%
Total 5000 Staff	\$ 281,651.91	\$ 515,407.13	-\$ 233,755.22	54.65%
6000 Building & Grounds				
6110 Grounds	780.00	3,200.00	-2,420.00	24.38%
6120 Snow Removal	12,110.00	14,400.00	-2,290.00	84.10%
6130 Church Maintenance	8,152.76	35,000.00	-26,847.24	646.00
6140 Furnishings	1,101.17	1,200.00	-98.83	49.27
6150 Cleaning & Paper Supplies	320.44	1,360.00	-1,039.56	23.56%
6160 Gas	12,842.91	17,000.00	-4,157.09	75.55%
6170 Electricity	2,787.31	8,840.00	-6,052.69	31.53%
6180 Water & Sewer	2,141.40	4,000.00	-1,858.60	53.54%
Total 6000 Building & Grounds	\$ 40,235.99	\$ 85,000.00	-\$ 44,764.01	47.34%
6500 Operations				
6510 Financial				
6512 Insurance	9,013.00	17,500.00	-8,487.00	51.50%
6513 Pledge Drive		500.00	-500.00	0.00%
Total 6510 Financial	\$ 9,013.00	\$ 18,000.00	-\$ 8,987.00	50.07%
6520 Office Expenses				
6521 Office Equipment	1,559.65	3,000.00	-1,440.35	51.99%
6522 Office Operations	4,142.08	9,200.00	-5,057.92	45.02%
6524 Phone & Internet	3,191.83	5,300.00	-2,108.17	60.22%
6525 Web, Marketing, Publicity		600.00	-600.00	0.00%
Total 6520 Office Expenses	\$ 8,893.56	\$ 18,100.00	-\$ 9,206.44	49.14%
6540 Staff Hiring & Support				
6541 Staff Meetings, Retreats, Acknowledgements	938.44	1,200.00	-261.56	78.20%
6542 Search & Transitions		100.00	-100.00	0.00%
Total 6540 Staff Hiring & Support	\$ 938.44	\$ 1,300.00	-\$ 361.56	72.19%
6550 Denominational Affairs				
6551 UUA Annual Program Fund	22,554.75	30,073.00	-7,518.25	75.00%
6552 Contributions - other organizations		500.00	-500.00	0.00%
Total 6550 Denominational Affairs	\$ 22,554.75	\$ 30,573.00	-\$ 8,018.25	73.77%
Total 6500 Operations	\$ 41,399.75	\$ 67,973.00	-\$ 26,573.25	60.91%
7000 Programs & Committees				
7212 Chime Playing and Maintenance	4,990.00	500.00	4,490.00	998.00%
7215 Organ & Piano Maintenance		800.00	-800.00	0.00%
7217 Choral Music & Supplies		700.00	-700.00	0.00%
7220 RE Supplies & Curriculum	474.50	1,500.00	-1,025.50	31.63%
7227 RE Special Programs	83.73	250.00	-166.27	33.49%
7228 Growth & Learning		100.00	-100.00	0.00%
7230 WUSYG Supplies & Projects	1,229.89	2,500.00	-1,270.11	49.20%
7240 Worship & Flowers & Candles	530.75	750.00	-219.25	70.77%

	Actual	Budget	over Budget	% of Budget
7250 Fellowship		200.00	-200.00	0.00%
7260 Hospitality		1,500.00	-1,500.00	0.00%
7270 Membership	1,320.80	1,200.00	120.80	110.07%
7280 Grief Group & PCAs	28.03	200.00	-171.97	14.02%
7285 Small Group Ministry		100.00	-100.00	0.00%
7290 Leadership Development		100.00	-100.00	0.00%
7296 Green Sanctuary		200.00	-200.00	0.00%
7299 Social Action Supplies		100.00	-100.00	0.00%
7610 Standing Committee	175.00	220.00	-45.00	79.55%
7620 SC Projects & Initiatives		220.00	-220.00	0.00%
7630 SFC - Planned Giving		100.00	-100.00	0.00%
Total 7000 Programs & Committees	\$ 8,832.70	\$ 11,240.00	-\$ 2,407.30	78.58%
7800 Social Action Grants				
7810 SOC Committee Grants		18,000.00	-18,000.00	0.00%
7820 SOC Share the Plate Grants	9,541.79	15,000.00	-5,458.21	63.61%
Total 7800 Social Action Grants	\$ 9,541.79	\$ 33,000.00	-\$ 23,458.21	28.91%
Total Expenses	\$ 381,662.14	\$ 712,620.13	-\$ 330,957.99	53.56%
Net Operating Income	\$ 88,480.45	-\$ 94,544.13	\$ 183,024.58	-93.59%
Other Income				
8070 from Sabbatical Escrow		10,000.00	-10,000.00	0.00%
8100 US SBA Payroll Protection Program Grant	89,500.00	89,500.00	0.00	100.00%
Total Other Income	\$ 89,500.00	\$ 99,500.00	-\$ 10,000.00	89.95%
Other Expenses				
9070 to Sabbatical Escrow		4,955.87	-4,955.87	0.00%
Total Other Expenses	\$ 0.00	\$ 4,955.87	-\$ 4,955.87	0.00%
Net Other Income	\$ 89,500.00	\$ 94,544.13	-\$ 5,044.13	94.66%
Net Income	\$ 177,980.45	\$ 0.00	\$ 177,980.45	

Saturday, Apr 10, 2021 10:24:26 AM GMT-7 - Cash Basis

Winchester Unitarian Society

Balance Sheet As of March 31, 2021

	TOTAL	
	AS OF MAR 31, 2021	AS OF AUG 31, 2020 (PP)
ASSETS		
Current Assets		
Bank Accounts		
1010 Winchester Savings Ops Checking	88,015.71	71,569.23
1015 Needham Bank Payroll Checking	26,755.98	5,896.41
1020 Winchester Savings CDs	86,737.97	85,854.30
1030 Needham Bank CD 1	0.00	0.00
1040 Needham Bank CD 2	62,227.61	62,017.68
1050 Winchester Savings MDF checking	7,887.91	7,986.03
1060 Winchester Savings Money Market	270,816.26	120,391.63
1080 Needham Bank Money Market	30,187.61	20,117.75
Total Bank Accounts	\$572,629.05	\$373,833.03
Total Current Assets	\$572,629.05	\$373,833.03
TOTAL ASSETS	\$572,629.05	\$373,833.03

Winchester Unitarian Society

Balance Sheet As of March 31, 2021

	TOTAL	
	AS OF MAR 31, 2021	AS OF AUG 31, 2020 (PP)
LIABILITIES AND EQUITY		
Liabilities		
Current Liabilities		
Other Current Liabilities		
3000 Operating Funds		
3010 Payroll Protection Plan Loan	0.00	89,500.00
3020 Capital Reserves		
3021 Undesignated Capital Reserves	55,117.72	55,117.72
3022 Project Escrow (Web, Marketing, Audit)	11,350.00	11,350.00
3023 Stabilization (Snow, Utilities, etc.)	10,000.00	10,000.00
3024 Sabbatical Escrow	43,917.01	43,917.01
3025 Fundraising Escrow	0.00	0.00
3026 Building Escrow	8,000.00	8,000.00
Total 3020 Capital Reserves	128,384.73	128,384.73
3050 Prepaid Pledges	19,840.00	60,723.18
3060 Prepaid Close the Gap	0.00	0.00
Total 3000 Operating Funds	148,224.73	278,607.91
3100 Building and Grounds		
3120 Michelson Room Redo	1,427.98	1,427.98
3130 Donald Ellis Fund	0.00	0.00
3140 from Stone Window Fund	845.39	845.39
3150 from Meditation Garden Fund	2,784.63	2,142.88
3160 Hardscape Upgrades Fund (Meyer)	6,692.57	7,102.57
3170 Building Security Enhancements	389.00	389.00
3180 Accessible Restroom	37,815.38	
3190 Mystic Valley Pkwy Project	77,725.00	
3191 HVAC project	9,284.00	
Total 3100 Building and Grounds	136,963.95	11,907.82
3200 Flower Funds		
3210 Flower Fund	630.63	265.14
3220 from Dawn Kelley Bartlett Fund	2,019.74	932.39
Total 3200 Flower Funds	2,650.37	1,197.53
3300 Memorial Fund	9,464.00	3,720.00
3400 Music Funds		
3450 Concert Series	11,807.41	2,246.41
3460 from Parkhurst Organ Fund	306.65	0.00
3470 from Sue Swap Fund	4,094.45	1,884.00
3480 Elora Trump Fund	766.05	766.05
3490 Harpsichord Fund	536.00	536.00
3491 Cerny/Thomas Fund	1,530.73	873.53

Winchester Unitarian Society

Balance Sheet
As of March 31, 2021

	TOTAL	
	AS OF MAR 31, 2021	AS OF AUG 31, 2020 (PP)
Total 3400 Music Funds	19,041.29	6,305.99
3500 Outreach Funds		
3510 Partner Church	0.00	2.00
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	0.00	20.00
3590 Outreach - other	0.00	0.00
Total 3500 Outreach Funds	800.82	822.82
3600 RE Funds		
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
Total 3600 RE Funds	3,322.70	3,322.70
3700 Youth Funds		
3710 WUSYG Service Project Fund	13,273.29	13,473.29
3720 Church School Youth Fund	209.17	188.57
3730 from Sandy Fries Youth Fund	780.91	780.91
Total 3700 Youth Funds	14,263.37	14,442.77
3800 Other Funds		
3805 SC Projects Fund (Baldwins)	46,064.84	46,064.84
3810 Equal Exchange	0.00	0.00
3820 Pastoral Care Ministry	934.85	934.85
3840 from Student Minister Fund	0.00	0.00
3850 Green Sanctuary Carbon Offset	1,600.00	1,100.00
3870 Yoga Fund	2,055.33	1,245.33
3880 from Downs Fund	0.00	0.00
3890 Contra	1,374.44	-3,825.56
3895 Minister Discretionary Fund	7,887.91	7,986.03
Total 3800 Other Funds	59,917.37	53,505.49
3900 Uncleared WSB Checks in ChWindows	0.00	0.00
Total Other Current Liabilities	\$394,648.60	\$373,833.03
Total Current Liabilities	\$394,648.60	\$373,833.03
Total Liabilities	\$394,648.60	\$373,833.03
Equity		
Opening Balance Equity	0.00	0.00
Retained Earnings	0.00	0.00

Winchester Unitarian Society

Balance Sheet As of March 31, 2021

	TOTAL	
	AS OF MAR 31, 2021	AS OF AUG 31, 2020 (PP)
Net Income	177,980.45	
Total Equity	\$177,980.45	\$0.00
TOTAL LIABILITIES AND EQUITY	\$572,629.05	\$373,833.03