



# **ANNUAL REPORT 2026**

**PUBLISHED MAY 2026**

Winchester Unitarian Society

478 Main St.

Winchester, MA 01890

# Warrant for the 159th Annual Meeting of the Winchester Unitarian Society

Sunday, May 17, 2026

Meeting Convenes at 12:30 p.m. in the Sanctuary

Luncheon at 12:00 p.m. in the Symmes Room

The 159th Annual Meeting of the Winchester Unitarian Society will be held at the Winchester Unitarian Society, 478 Main Street, Winchester, Massachusetts, to consider the following:

- Article I** To hear and act on the Minutes of the May 18, 2025, Annual Meeting.
- Article II** To hear and act on the Report of the Standing Committee.
- Article III** To hear and act on the Report of the Interim Parish Minister, Reverend Seth Carrier-Ladd.
- Article IV** To hear and act on the Report of the Director of Youth and Children's Ministries, Sam Wilson.
- Article V** To hear and act on the Report of the Office Administrator, Stacey Katz.
- Article VI** To hear and act on the Report of the Music Director, John Kramer.
- Article VII** To hear and act on the Report of the Ministerial Search Team.
- Article VIII** To hear and act on the Report of the Trustees of the Permanent Funds.
- Article IX** To hear and act on the Treasurer's Report for the fiscal year ending August 31, 2025 and the Treasurer's Estimated Report for the fiscal year ending August 31, 2026.
- Article X** To hear and act on the budget recommended by the Standing Committee for the fiscal year ending August 31, 2027.
- Article XI** 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, 2027; 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 XII** To hear and act on the Report of the Nominating and Leadership Development Committee and to elect officers and committees for the ensuing year.
- Article XIII** To hear and act on the proposed Congregational Covenant of the Winchester Unitarian Society.
- Article XIV** To hear and act on any other business that may legally come before this meeting.

By the order of the Standing Committee  
Ginger Jo Hanson, Clerk

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# Minutes of the 158th Annual Meeting

of the Winchester Unitarian Society

Sunday, May 18, 2025

## Call to Order

The 158th Annual Meeting of the Winchester Unitarian Society was held on May 18, 2025 at the Winchester Unitarian Society, 478 Main Street, Winchester, Massachusetts. It began at 12:15pm and was presided over by Martin Newhouse as Moderator, with Ginger Hanson as Clerk.

Martin announced that the meeting was being live streamed; however, due to the delay inherent in livestream technology, remote participants would not be able to vote.

## Chalice Lighting

Reverend Seth Carrier-Ladd performed the chalice lighting and reminded us to be kind, collaborative, and concise during the, hopefully, brief meeting.

Martin summarized the history of Robert's Rules of Order. A motion and second must happen prior to any discussion. If the moderator calls an item out of order it is not about merit, but about limiting discussion to the articles. This is because not all members will have had a chance to review the topic. Ending a discussion or tabling a motion requires a 2/3 vote. A motion to call the question is seconded, no discussion, straight to vote. Simple majority for all others

## Attendees

The moderator confirmed that more than twenty (20) members were present, constituting a quorum under the Society's bylaws. Voting members in attendance [75]

## Meeting Procedures

Martin reminded attendees that the meeting's purpose was to hear and act on the items listed in the warrant as published by the Standing Committee. Only those matters could be considered. He emphasized the importance of conducting debate with civility and fairness, guided by the merits of each issue.

He explained that, under Massachusetts law, only items listed in the warrant may be discussed or voted on to protect the rights of members not in attendance. For action items, discussion would occur only after a motion was made and seconded. All votes would be determined by a simple majority unless a motion to end debate was made, which requires a two-thirds majority.

## Business Items

### **Article I To hear and act on the Minutes of the May 19, 2024, Annual Meeting and the Minutes of the October 6, 2024, Special Meeting.**

Motion: [Chris Weigand] I move that the reading of the minutes of the May 21, 2023, Annual Meeting and the October 6, 2024, Special Meeting be waived and that they be approved as written.

The motion was seconded. The motion was carried by the vote [all in favor, no opposed].

### **Article II To hear and act on the Report of the Standing Committee, Gordon McIntosh.**

**Article III To hear and act on the Report of the Interim Parish Minister, Reverend Seth Carrier-Ladd.**

**Article IV To hear and act on the Report of the Director of Youth and Children’s Ministries, Sam Wilson.**

**Article V To hear and act on the Report of Administrator and Outreach Manager, Richard Dorbin.**

**Article VI To hear and act on the Report of the Music Director, John Kramer.**

**Article VII To hear and act on the Report of the Trustees of the Permanent Funds, Rebecca Kelley.**

Motion: [Marilyn Wilson] I move that the reports of the Standing Committee (Gordy); Interim Parish Minister Reverend Seth Carrier-Ladd; the Director of Youth and Children’s Ministries, Sam Wilson; the Church Administrator and Outreach Manager, Richard Dorbin; the Music Director, John Kramer; and the Trustees of Permanent Funds, be received with thanks as submitted.

The motion was seconded.

**Discussion**

Gordon McIntosh, Reverend Seth Carrier-Ladd, Sam Wilson, Richard Dorbin, John Kramer, and Rebecca Kelley summarized the reports they submitted and answered questions.

The motion was carried by the vote [all in favor, no opposed].

**Article VIII To hear and act on the Treasurer’s Report for the fiscal year ending August 31, 2024 and the Treasurer’s Estimated Report for the fiscal year ending August 31, 2025.**

Motion: [Chuck Khuen] I move that the Treasurers’ Report for the Fiscal Year ending August 31, 2024, and the Treasurers’ Estimated Report for the Fiscal Year ending August 31, 2025, be approved.

The motion was seconded.

**Discussion**

Brad Steele summarized the reports they submitted and answered questions.

The motion was carried by the vote [all in favor, no opposed].

**Article IX To hear and act on the budget recommended by the Standing Committee for the fiscal year ending August 31, 2026.**

Motion: [Betsy Bowles] I move that the budget recommended by the Standing Committee for the Fiscal Year ending August 31, 2026, be approved.

The motion was seconded.

**Discussion**

Brad Steele summarized the reports they submitted and answered questions.

The motion was carried by the vote [all in favor, no opposed].

**Article X 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, 2026; 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: [Liz Lintz] 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, 2026; and that the Treasurer be and is hereby authorized, subject to the approval of the Standing Committee, to borrow from time to time, for a period not to exceed one year, such amounts as may be necessary and appropriate to meet the expenses, debts, and other charges of the Society during the fiscal year for which provision has not otherwise been made.

The motion was seconded. The motion was carried by the vote [all in favor, no opposed].

**Article XI To approve and elect the members of the Ministerial Search Team for the purpose of conducting a search for the next settled minister of the Society.**

Motion: [Peter McEntee] I move that the election of Mayra Rodriguez-Howard, Steve Kent, Alison Kirchgasser, Terrill Levering, Martin Newhouse, Sophia Sid, and Dan Spencer to the Ministerial Search Team to identify the Society's next settled minister be approved.

The motion was seconded. The motion was carried by the vote [all in favor, no opposed].

**Article XII To hear and act on the Report of the Nominating and Leadership Development Committee and to elect officers and committees for the ensuing year.**

Motion: [Alison Kirchgasser] 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. The motion was seconded.

The motion was seconded. The motion was carried by the vote [all in favor, no opposed].

**Article XIII To hear and act on A Congregational Resolution of Conscience and Resistance proposed by the Social Action and Outreach Committee for adoption by the Society.**

Motion: [Fritzie Nace] I move that A Congregational Resolution of Conscience and Resistance proposed by the Social Action and Outreach Committee be adopted by the Society.

The motion was seconded.

### **Discussion**

The Moderator noted that the procedures would not include any wordsmithing or the language of the resolution. He also noted that we would use a paper ballot. John Healey

presented the Resolution. Reverend Seth Carrier-Ladd commented that the statement may be imperfect, but recommended supporting it if it is enough to represent us as a congregation. Clarifications were made of the text of the statement, including page numbers. Questions were answered with respect to usage of the statement, including how it will not affect our IRS status. Statements in favor, in opposition, and in abstention were made by congregants.

Motion: [Peter Baldwin] I move that the question be called.

The motion was seconded. The motion was carried by the vote  $\frac{2}{3}$  of votes cast [36 in favor, 17 opposed]. The original motion, Article XIII was carried by the paper ballot vote [59 in favor, 8 opposed, 8 abstained].

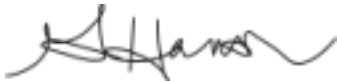
#### **Article XIV To hear and act on any other business that may legally come before this meeting.**

Motion: [NAME OF MOVER] I move that A Congregational Resolution of Conscience and Resistance proposed by the Social Action and Outreach Committee be adopted by the Society.

The motion was seconded. The motion was carried by the vote [all in favor, no opposed].

#### **Adjournment**

[NAME OF MOVER] moved that the meeting be adjourned, and this was agreed upon at [2:15pm].



Clerk  
Winchester Unitarian Society  
Date of Approval

# STAFF REPORTS

## Interim Parish Minister

minister@winchesteruu.org

Dear Winchester Unitarian Society,

It has been an honor and a pleasure to serve these past two years as your Interim Minister – it’s hard to believe how fast it’s gone! While it was certainly disappointing that the settled search process failed to generate a match this year, I am delighted that the Standing Committee invited me to return for a third year serving as your interim minister. I am very much looking forward to this additional year with you as I have very much enjoyed our past two years together.

It has been a busy year on a lot of fronts. At the behest of the Standing Committee, the main focus of the Transition Team’s work this year has been leading the congregation in a process to create a congregational covenant. If you haven’t participated in the process so far, a quick recap: a congregational covenant is an agreement between all the members, friends, and staff of the congregation about how we want to relate to one another. To create that was truly from and for the congregation, the Transition Team held five sets of events, always pairing an in-person version with a virtual version, as part of this ten-month process. We asked you what was important to you, we brought back what we heard for your feedback, we drafted a covenant based on what we heard from, we got feedback on the draft, and now a final draft has been presented to the congregation for vote at the annual meeting.

If you, the congregation, choose to adopt the final draft at the annual meeting, the next steps will be to work to integrate the covenant into the daily life of the congregation. Creating the covenant (if it's approved) is only the first step. Next is further and deeper reflection on how we want to be together as a community. Look forward to more conversation next year about how to live our new covenant (if adopted) into being.

I shared in my annual report last year that “navigating this challenging time in our country’s history has become a major subtext, perhaps even the most prominent context, for navigating this interim period with you.” That statement has proved prescient. Whether it was ICE operations the killing of United States citizens, the war in Iran, or any other number of horrific actions taken by the current federal administration, we have throughout the year been grappling with what we as a religious community are called to do in response to government action that flies in the face of our beliefs and values.

One response was the Resources for Resilience worship series offered this winter and spring, whereby we solicited various resources that members and friends of the congregation turn to during difficult times, and built worship services around sharing the results. The inspiring readings service, the music service, and the personal stories of resilience service all captured different ways and different mediums by which members and friends of the congregation find resilience in their lives. We are in the final stages of curating everything that was submitted for sharing on the congregation’s website. Figuring out how to respond to the challenges in our country and in the world right now will likely remain an important task for next year.

Over the course of the spring, I also assisted the Membership Committee in leading a three-part New Member class. This culminated in a New Member ceremony on Sunday, May 3<sup>rd</sup> with five new members joining us. Welcome again to all our new members – we are so excited to have you as part of our community.

Looking ahead to next year, the search for a settled minister will continue. Your intrepid Search Committee has all agreed to return for a third year, which is fantastic news. A huge shout out to them for all the work they have done the past two years, and immense appreciation for their willingness to continue on for a third. From an interim perspective, next year will be all about figuring out what we need to do to set you up for a successful search and doing it.

For myself, I am looking forward to spending another year with you, as I have greatly enjoyed my time with you so far.

in faith,  
Rev. Seth Carrier-Ladd  
Interim Senior Minister  
Winchester Unitarian Society

## Music Director & Music Committee

john.kramer@winchesteruu.org and music@winchesteruu.org

This has been another wonderful year of music making at the Winchester Unitarian Society. I want to review our regular offerings and highlight some unique aspects of this year.

The adult choir rehearses weekly and sings on most Sundays of the church year. The spiritually moving anthems are a centerpiece of our worship services. Like all aspects of our music program, we enjoy presenting a broad spectrum of musical styles and traditions. This year saw music by the Indigenous composer Linthicum-Blackhorse with his arrangement of the Lakota melody *ChaNté Wasté Hoksila*, as well as music from Indian-American composer Reena Esmail with her invocation of classical Indian rhythms: *Ta Ra Ki Ta*. We also presented arrangements of compositions from members of the African Diaspora, with Harry Belafonte's *Turn the World Around*, and Oscar Peterson's *Hymn to Freedom*. There were choral classics like the *Hallelujah Chorus* at Easter and *How Lovely is Thy Dwelling Place* from the Brahms Requiem at our service of remembrance. We also performed a lot of music to help us process the current state of the world, including Lissa Schneckeburger's *Hope Lingers On* in January (you may remember Lissa's performance in our concert series about 15 years ago).

Our two Music Sundays focused heavily on social justice music, and I am always thankful that our choir is eager to take on challenging music and topics and very capable of delivering powerful performances. In December we presented my new work, *The Freedom and Democracy Suite* which addresses the erosion of personal and civil liberties head on. And a highlight of the year was the March 22<sup>nd</sup> performance of *The Immigrant Experience* with a chorus of about 90 singers from five different UU congregations. Hosted by the UU Urban Ministry, this concert raised about \$3,500 for two immigrant justice groups, BIJAN and RIAC. I want to acknowledge the Sue Swap fund for helping to pay for the instrumental musicians and soloists for these performances.

In the broader UU community, *The Immigrant Experience* was performed at the UU church in Sherborn and will be performed in May at First Parish in Concord. A movement of this work was performed at First Parish in Bedford.

Children's Chorale and Youth Choir continue to provide meaningful opportunities for singing and community for our younger members. Our weekly rehearsals are fun and engaging and a chance to connect musically. Both groups performed monthly in the worship services, sometimes together and also with the Adult Choir. A highlight for the Children's Chorale was the performance at Easter with our guest string quartet and handchimes. A highlight for the Youth Choir was their participation in *We Won't Go Back* – the third movement of my *Freedom and Democracy Suite*. And a yearly highlight is their concert in May where we hear favorites from throughout the program year. In addition, both groups have had occasion to play the chimes in the bell tower.

The concert series continues to be a consistent force, both in bringing people together in our sanctuary and in raising funds for our church. Our fall concert featured our soloists and it is a delight to hear them in performance (as well as in our worship services). This is our second most requested concert after the annual jazz concert, which took place as it always does, on the last Friday in January. In March we were very happy to host Lindsay Foote in a homecoming of sorts for her. Prior

to the March show, we had a celebratory champagne and dessert reception in honor of our 20 years of concerts. To date the concert series has raised \$10,367.66 net of expenses.

Other events include the Family Dance in the fall and a special children's music event during RE in April – both funded by the Cerny/Thomases fund. The Solstice service and Caroling is another favorite annual tradition, as are our Christmas Eve services. We are also looking forward to welcoming back Matt Heaton and the Outside Toys for Winchester Town Day.

We should not forget the summer services and I want to thank Steve and Eli Forcucci, Chris Weigand, Peter McEntee, Mary Cunningham, and Cheryl Blanchard for providing music for our services throughout the summer. And we extend our gratitude to Andrew Goodridge for filling in on three Sundays while I was away. We were also fortunate to have the summer choir sing three times last summer.

We have a very special music program here at WUS. We are able to provide deeply meaningful music from diverse sources and engage many members in music making, whether they are singing hymns in the pews, rehearsing with one of our choirs, or simply enjoying the sounds of beautiful music. It is a wonderful thing and I look forward to its continuation in the future.

Special thanks go to the Music Committee who help organize so many musical events here; all of our singers and instrumentalists who participate in many varied ways; Jack McCreless, Janet Nelson, and Sarah Milt, who help keep our music library organized. And thanks to the Sue Swap fund and Cerny/Thomases fund which make many events possible.

Respectfully submitted by John Kramer, Music Director

## Director of Youth and Children's Ministries

sam.wilson@winchesteruu.org

### Introduction and Overview: Growing Together in Community

As I reflect on the 2025–26 program year at Winchester Unitarian Society, the word that continues to rise to the surface for me is *connection*. This was a year of building and rebuilding connections — between children and their faith, between youth and one another, between generations within our congregation, and between our community and the wider world around us.

There were many moments this year where I found myself looking around and thinking about how much life and joy continues to exist within our ministries for children and youth. Whether it was dozens of children throwing Holi colors together on the terrace, teens bonding over late-night conversations at Ferry Beach, mentors listening deeply to Coming of Age youth as they discerned their values, or over 100 people volunteering together for our Haunted House fundraiser, this year consistently reminded me that faith formation happens most powerfully in relationship.

This was also a year of meaningful transition and experimentation. We officially launched our new Coming of Age program, sunsetted JUSYG, expanded our summer RE programming, strengthened our multigenerational offerings, and continued refining the structures Brenna and I have been building over the past several years. Some of these initiatives were long hoped-for dreams finally becoming reality; others emerged organically in response to the needs of our community as they evolved throughout the year.

I returned this year for my 4th year as Director of Youth & Children's Ministries (and 12th year overall serving WUS youth), while Brenna Mayer returned for another strong year as our Children's Religious Education Coordinator. We also welcomed Amelia into the role of Assistant Director of Youth Ministries, and Nursery Coordinator, later in the year, after spending much of the Fall navigating staffing challenges and searching for the right candidate. Throughout all of this, our teen RE teachers, volunteer teachers, REC members, YAC members, OWL facilitators, mentors, parents, and countless other volunteers helped sustain and strengthen our ministries in ways both visible and invisible.

Our vision for faith formation at WUS continues to center around the idea of a “community of communities” — one where children, youth, parents, elders, and everyone in between can learn, lead, celebrate, serve, and grow together. I believe this year brought us closer to that vision in many meaningful ways.

## Attendance

Activity	# of Children or Youth in 2025	# of Children or Youth in 2026
RE (registered/attending infants & children)	32	38
WUSYG	12	10
Coming of Age	n/a	5
OWL	10	16

While WUSYG numbers remained relatively small this year, participation among those attending was deep and meaningful, and the group became increasingly close-knit over the course of the year. RE attendance, meanwhile, continued to grow and stabilize, particularly among younger families and children participating regularly in Sunday morning programming. We also saw tremendous engagement in all-ages worship, family events, service projects, and multigenerational gatherings throughout the year.

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## Overview of Children’s Ministries: RE and Family Programming

Our RE programming continued to flourish this year under Brenna’s thoughtful leadership and creative curriculum development. Spirit Play classes for younger children continued exploring UU values, world religions, creation stories, holiday traditions, and stories rooted in mystery, science, wonder, generosity, interdependence, justice, and belonging.

This year’s Neighboring Faiths program included deep dives into UUism, Hinduism, Buddhism, and Earth-based traditions. Students visited the Shivalaya Hindu Temple in Medford, engaged in discussions about religious pluralism, and continued developing curiosity and respect for traditions beyond our own. Brenna also implemented a more detailed structure for the Neighboring Faiths curriculum, supported by volunteer teachers and RE assistants.

One of the most exciting developments this year was the successful launch of our new Coming of Age program. After discernment with REC and YAC, we sunsetted JUSYG and instead invested deeply in building a robust Coming of Age experience for 7th and 8th graders (as well as a few older youth during this transitional year). The program included Sunday morning classes, monthly afternoon sessions, mentor pairings, journaling, credo development, writing exercises, values exploration, and opportunities for meaningful intergenerational connection.

Watching our youth begin articulating their own values, beliefs, and identities within a UU framework was incredibly moving. The mentor relationships that formed this year were especially meaningful and helped bridge generational divides within the congregation in beautiful ways.

This year also included a wide variety of beloved all-ages traditions and events, including:

- Water Communion
- Animal Blessing Service
- Solstice Spiral
- Paper Bag Pageant
- Easter Egg Hunt
- Holi celebration and throwing of colors
- Community Dance
- Holiday festivities and seasonal services
- Service projects such as the Mitten Tree, Guest at Your Table, and the Canoe Trip/clean-up

Our all-ages and collective activities continue to be some of the most joyful and effective ways we build community across generations.

We also continued our expanded childcare initiative this year, striving to provide childcare support for as many church events and gatherings as possible so that families with young children could participate more fully in congregational life.

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## **Overview of Youth Ministries: WUSYG**

This year was something of a rebuilding and re-centering year for WUSYG. While the group remained relatively small numerically after several years of significant graduating classes and ongoing post-pandemic shifts, the teens who participated consistently formed a deeply caring and connected community together.

WUSYG gatherings throughout the year included:

- discussions on immigration justice, environmental justice, resilience, and covenant
- worship planning and leadership
- service work
- games and social bonding
- outreach projects
- collaboration with our Partner Church in Transylvania
- retreats and overnight events
- participation in rallies and justice events
- fundraising efforts
- extensive work on the Haunted House fundraiser

One particularly exciting initiative this year involved renewed connections with our Partner Church in Transylvania. This project may eventually grow into future exchanges or collaborative experiences.

Our annual Fall Retreat at Ferry Beach, though small in attendance, was deeply meaningful. Teens spent time exploring values, covenant, service, and community together in a setting that encouraged vulnerability and connection.

The WUSYG sleepover, youth-led worship service, Dwelling Place meal service, and participation in the “No Kings” rally were also highlights of the year.

The culmination of the year for many teens was our Spring Service Trip to Boston. After much discernment, we postponed our return to West Virginia in favor of a more local and accessible service experience this year. The trip included:

- service work with La Colaborativa in Chelsea
- work at Paige Academy in Roxbury
- neighborhood clean-up efforts
- visits to the UUA and Harvard UU Ministry
- reflection and conversations focused on immigration justice

The trip was inclusive, educational, relational, and deeply aligned with our UU values.

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## **Haunted House Fundraiser: A Truly Intergenerational Ministry**

Without question, one of the defining initiatives of this year was our Haunted House fundraiser, “Dr. Feverdream’s Halloween Experiment.”

Originally envisioned as both a fundraiser and a community-building event, the Haunted House exceeded nearly all expectations. Over 100 volunteers ranging in age from 5 to 85 participated in various ways, including acting, construction, costumes, concessions, sound and lighting, special effects, ticketing, publicity, and cleanup.

The event itself became an extraordinary example of what multigenerational ministry can look like at its best. Children, youth, parents, elders, and staff all collaborated creatively and joyfully together toward a common goal.

Financially, the fundraiser surpassed our original \$6,000 goal, helping support WUSYG’s future service trip efforts while also generating positive visibility and energy for WUS more broadly.

While the event required an enormous amount of work and coordination, it also demonstrated the incredible creativity, dedication, and collaborative spirit present within this community.

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## **Professional Development and Wider UU Leadership**

This year also included several opportunities for leadership and service within the wider UU world.

I attended and presented at the LREDA (Liberal Religious Educators Association) Fall Conference in Tulsa, where I led a workshop titled: “You(th) Got This: How to Make Your Youth Ministry Lit (Like a Chalice!).” The workshop was simultaneously facilitated across multiple conference hubs and online, and it was deeply rewarding to share some of the wisdom and practices we have developed at WUS over the years.

I also:

- served on the Community Relations Team for the conference
- continued serving on the New England Region LREDA Nominating Committee
- worked with UUA staff regarding redevelopment of a Coming of Age curriculum I originally helped create during the pandemic
- participated in regional gatherings of religious educators
- continued cultivating collaborative relationships with other UU youth ministry leaders

One especially meaningful aspect of the Tulsa trip was visiting the UU Church of Tulsa, which is connected to curriculum work I previously developed examining UU history and the Tulsa Massacre.

I continue to feel grateful that work emerging from WUS ministries continues contributing to the wider UU movement beyond our congregation itself.

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## Ongoing/Monthly/Weekly DYCM Duties

In addition to direct programming, ongoing responsibilities this year included:

- REC meetings
- YAC meetings
- Weekly staff meetings and worship planning meetings
- Meetings with Rev. Seth
- Weekly coordination meetings with Brenna
- Weekly coordination meetings with Amelia
- Payroll updates for supervised staff
- Weekly and monthly communications with families
- Social media outreach and communications
- Oversight of volunteer coordination
- Worship collaboration
- Event planning and logistics
- Recruitment and hiring efforts
- Pastoral support and relationship-building with youth and families

As always, much of the most important ministry happens quietly — in conversations after youth group, check-ins with parents, moments of accompaniment during difficult times, helping youth navigate identity and belonging, and simply creating spaces where young people know they are loved exactly as they are.

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## Final Thoughts

As I think back over this year, I continue returning to gratitude.

I am grateful for Brenna's creativity, dedication, and partnership in ministry. I am grateful for Amelia stepping into her new role with enthusiasm and care. I am grateful for our teen teachers, mentors, OWL facilitators, REC and YAC members, volunteers, and parents. I am grateful for every person

who helped create a costume, cook a meal, teach a class, lead a game, walk alongside a teen, or simply smile at a child on Sunday morning.

Most of all, I am grateful for the children and youth themselves.

In a world that often feels increasingly anxious, divided, and uncertain, our young people continue to show remarkable compassion, courage, curiosity, resilience, creativity, and joy. They continue asking thoughtful questions, caring deeply about justice, supporting one another through struggles, and reminding us all what a beloved community can actually look like in practice.

There are certainly challenges ahead — as there always are in ministry — but I leave this year feeling hopeful about where we are headed together. The foundations we continue building feel strong, rooted in relationship, creativity, flexibility, and love.

May we continue creating a community where all young people know:

- that they belong,
- that their voices matter,
- that they are loved,
- and that they can help shape a better world.

Submitted with deep gratitude and love,

**Sam Wilson**

## Office Administrator

office@winchesteruu.org

This has been my first year serving as Administrator, and I am deeply grateful for the welcome, patience, humor, and support I have received from this congregation. Beginning in July meant stepping into a role with a great deal to learn, and from the very beginning I was surrounded by people willing to answer questions, share institutional knowledge, and help me find my footing. I am very grateful to them!

### Staff & Volunteers

I specifically want to recognize our staff team. Jenny Goh has been an invaluable source of support and knowledge throughout my first year. Mike Bussell and Mike Donegan have worked incredibly hard caring for the building and supporting the congregation through a period of transition in sexton staffing after long-time sexton Joe Coriccelli resigned after some health challenges. Their flexibility, dedication, and willingness to tackle whatever unexpected issue appeared next has made a tremendous difference.

### Building & Facilities

This year also brought significant building-related projects and transitions. Together with Buildings & Grounds volunteers and sextons we addressed numerous building concerns. A particular focus was ensuring the building remained welcoming, functional, and cared for during an especially busy year.

Some highlights:

- Repaired hot water heater, roof leak, elevator, burst pipe, and smoking vent motor
- Began the process to compare insurance policies offered by Church Mutual and the new UUA Guardian offering.
- Removed solar debris, old broken furniture and items that have overstayed their welcoming throughout the building.
- Hired Orkin for ongoing pest control, addressing mouse problems throughout the building.
- Contracted AllPro Cleaning Systems for twice-weekly service of high-traffic areas — saving \$7,440 annually vs. prior staffing costs.
- Improved building security: new external cameras, updated key lists, nursery egress improvements.

### Administrative Operations

- Transferred years of historical records from former administrators' accounts into the WUS Google Workspace; reorganized digital storage
- Created WUS-owned Trustee Drive
- Improved office and building communication practices
- Updated website and YouTube channel throughout the year

### Human Resources, Payroll & Compliance

- Updated and improved payroll processing, benefits reporting, and retirement scheduling; identified and corrected prior payroll discrepancies.
- Completed staff CORI checks

- Implemented Time Off tracking back to January 2025.
- Registered WUS for Massachusetts PFML; deductions began April 2nd; staff notified and documentation collected.
- Submitted UUA Certification
- Amended onboarding/offboarding procedures.

## **Finance & Membership**

- Submitted tax exemption forms (ST-5/ST-2) to Amazon, Staples, and other vendors — ending unnecessary sales tax payments.
- Transitioned regular bills to ACH payments; cancelled unneeded subscriptions.
- Corrected UUA membership reporting gaps; began Breeze database cleanup.
- Supported pledge drive
- Drafted communications policy and created weekly OOS event insert.

## **Rentals**

Both the nursery school and Winchester Chinese School will continue their summer camps and schools come next fall. In keeping with our UU principles, we have also hosted interfaith and cross-cultural events for families seeking a welcoming, neutral space.

## **Live Streaming — Volunteers Needed!**

Our current streaming platform is being phased out. We have decided to transition to direct YouTube live streaming over the summer. This will save costs and simplify the process. If you are generally comfortable with on demand tech platforms like Zoom, and interested in learning some new skills, we'd love your help running the Sunday livestreams. No experience needed — training provided.

## **Looking Ahead**

- Complete YouTube livestream transition; purchase streaming license, update all QR codes and links.
- Supporting B&G committee and Standing Committee in selecting an insurance policy holder when our contract with Church Mutual expires in July
- Hire a company to modernize the website; work with the company to design a modern, attractive and easy to navigate website.
- Continue Breeze cleanup, membership roster with UUA and archive protocol.
- Record church cyclical needs in office procedures document and sexton task lists.

On a more personal note, thank you for welcoming not only me, but my dog Frodo. Frodo thanks everyone for allowing him to serve as office door greeter and morale support on the occasional Monday and Friday.

This first year has been full of learning, problem-solving, and growth. More importantly, it has shown me how deeply this congregation cares for its people, its community, and its shared ministry. I am grateful to be part of that work and look forward to continuing it together in the coming church year.

In covenant and community,  
Stacey Katz

## Staff Covenant

We agree to...

- endeavor to work together and co-create ministry as a team (avoiding silos)
- be respectful of deadlines and each other's time and the impact we have on each other
- nurture creativity and new perspectives
- make time to bond and have fun
- communicate directly and kindly with each other, in the appropriate setting
- celebrate each other's work and lift each other up, both in person and when not together
- be willing to lean into discomfort to enable growth, understanding that safe doesn't always mean comfortable
- do unto others as they want done unto them (platinum rule, not golden rule); be willing to tell others what you want and need
- make space and take space, as appropriate for our personality type
- treat each other with respect and kindness
- be accountable to each other, the congregation, and Unitarian Universalism
- work to dismantle white supremacy culture and other systems of oppression.

# FINANCIAL REPORTS

## Report from the Treasurer

treasurer@winchesteruu.org

### Gratitudes

Thank you to Jenny Goh for so capably performing the role of bookkeeper and handling the ever expanding methods used to make donations to WUS.

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

Thank you to Rebecca Keller, Pete Baldwin, and Denise Pappas, our Trustees of Permanent Funds, for managing our church endowments with a focus on environmentally and socially responsible investing.

Thank you to John Healey and Liz Lintz, pledge drive leaders extraordinaire.

Thank you to Kathy Richardson, Marcy Tompson, Brad Steele and Chris Weigand for joining me on the team preparing the FY27 budget for the Standing Committee and congregational review.

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

Thank you to Chris Weigand and Kathy Richardson for completing a volunteer-led review of FY25 finances.

Thank you to Victoria Ippolito and Sarah Milt along with their terrific team of participants in our inaugural Haunted House event which generated over \$6.8K in operating budget and WUSYG service trip funds.

Thank you to Sue Kiewra and her crew of talented crafters for raising over \$5K from the Crafting Kindness and Open Studios event.

Thank you to John Kramer, Music Committee organizers, and sponsors of our 20th concert series season.

Thank you to James Pidacks and Stacey Katz for filing for an abatement of \$5K in MA sales tax payments on our National Grid gas bills.

Thank you to Margaret Lowrey and Brad Steele for their generous financial support of the upgrade to our rooftop solar panels. Thank you to Chuck Khuen for overseeing the project. Thank you to Chris Weigand for decrypting the IRS tax code and submitting paperwork for a \$29K rebate. We look forward to substantial reductions in our electrical costs.

Thank you to the Building and Grounds committee, their crew of volunteers, and our sextons for saving the church money overseeing projects like the overhaul of the church's 50+ year-old heating system, doing the annual spring landscaping cleanup, to name just a few.

Thank you to Kathy Richardson, Sue Kiewra 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. Seth Carrier-Ladd, for his guidance and commitment to our community during his second year of interim ministry.

**On the following pages, you will find:**

- FY25 (prior year) report on finances for September 1, 2024 through August 31, 2025.
- FY26 (current year) report on finances for the period of September 1, 2025 through August 31, 2026. Projections are based on actuals through March 31st and our best estimates for income and expenses in the coming months.
- FY27 (next year) proposed budget highlights for the period of September 1, 2026 through August 31, 2027.
- Balance sheet report showing accounts and balances on 8/31/2024, 8/31/2025, and 3/31/2026.
- Balance sheet accounts activity for FY25 and for FY26 through March 31, 2026.
- Multi-year detail sheet for ease of comparison of actuals versus budget for FY25; actuals versus budget for FY26 through March 31st with projections through August 31st; and the proposed budget for FY27.
- FY27 (next year) Budget Proposal for September 1, 2026 through August 31, 2027 in condensed, easy-to-read format - approved by the Standing Committee on May 1, 2026 and presented for consideration by vote of WUS membership at the 2026 Annual Meeting.

It has been a privilege to serve our WUS faith community this year as Treasurer. I look forward to serving along with Chris Weigand as co-Treasurer next year.

Respectfully submitted, Judy Murray

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**FY25 (prior year) Report - September 1, 2024 - August 31, 2025**

Operations for the fiscal year 9/1/2024 through 8/31/2025 (FY25) closed with a surplus of \$119.83 in welcome contrast to the budgeted deficit of \$5,261 approved by the congregation at the WUS Annual Meeting in May 2024.

The primary positive variances were:

Income related:

- Sunday collections and Share-the-Plate donations were \$9,598 higher than forecast attributable to increased
- Sunday service attendance, in-person and online.

- Interest on bank deposits, principally CD and Money Market accounts at Winchester Savings Bank and Needham Bank, was \$1,524 greater than forecast due to continuing higher interest rates.
- Building rental and usage fees were \$3,691 greater than forecast due to successful summer camp group rentals.
- The church fundraiser “Not Your Average Rummage Sale” generated \$34,584, \$14,584 in excess of budget. This community event was the most successful fundraising effort in church history!
- WUS enjoyed a highly successful concert series netting \$3,500 over budget.

Expense related:

- Staffing related expenses were \$2,625 less than budgeted. Items under budget included the administrator Richard Dorbin’s healthcare costs once he qualified for Medicare, reduced costs for the Youth Assistant since the WUSYG Service project was local, non-use of professional expenses by the Music Director.
- Committee expenditures, continuing the trend of recent years, were under budget providing \$4,279 in savings to the church. Of note, participation fees for OWL and JUSYG programs offset or exceeded expenses for these programs. We continue to benefit from Patrick Draine’s generous donation of his professional services to tune the church’s pianos free of charge.
- Combined Share-the-Plate and Social Action Committee grants totaled \$42,453 or 5.17% of total congregational budget.

There were several negative variances as well, the most significant being:

Income related:

- There were three components to pledge income: pledge payments received before 8/31/2024 including pre-payments, matching pledge payments from our Standing Committee members to encourage first-time pledgers, and pledge payments for the prior year (FY24) that were received after 9/1/2024. Combined pledge income was budgeted at \$435,280; we received \$430,731 in payments; result was \$4,549 less than budgeted. As FY25 pledge payments continued to roll in, they were posted as FY26 income – it’s never too late to send in a pledge payment. Thank you to all who fulfill their pledges. Your contributions are the biggest factor in funding church operations. On a sad note, a number of our very generous pledgers died before fulfilling their pledges. We deeply appreciate these folks for the steady financial support they provided over the years and miss them for all the ways they contributed to the life of our congregation.

Expense related:

- Ministerial costs exceeded budget by \$7,433. Budgeting for our lead minister was done with the expectation that Rev. Heather Janules was continuing at WUS. Contracted costs for interim minister Rev. Seth Carrier-Ladd resulted in an additional \$4,508 in expenses. Summer minister expenses of \$2,000 included summer 2024 (paid late) and summer 2025 against a zero-budget line. Guest preachers exceeded budget by \$925.
- Increased compensation for the Administrative Assistant was primarily attributable to the UUA’s changing guidance on benefits policies based on a changed interpretation of IRS rules. Along with working additional hours, total Admin Assistant expenses were \$7,613 over budget.

- Sexton expenses were over budget by \$2,208 due to working additional hours.
- Excess expenses for RE teachers and aides were mostly offset by savings from not filling the RE Program Assistant position.
- Building and grounds expenses exceeded budget by \$19,592. Sub-category overages follow:
  - Grounds care was over budget by \$6,019.
  - Snow removal exceeded budget by \$3,318.
  - Church maintenance was over budget by \$4,419 which could have been worse except for efficiency incentive rebates from National Grid totaling \$8,962 for steam trap upgrades.
  - Gas heat had the largest B&G overage exceeding budget by \$9,248. Increased gas rates rather than increased usage were the primary cause of this variance.

Assets in the checking and CD accounts at the Winchester Savings Bank and Needham Savings Bank totaled \$388,155 as of the end of our fiscal year, August 31, 2025. This compares with a balance in those accounts of \$227,466 at the end of FY24 (August 31, 2024).

WUS Permanent (aka Endowment) Funds distributed \$138,248 in income to the church during FY25. Meyer and Downs Trusts disbursed \$70,180 in FY25 income.

Following a formal vote of approval at the Standing Committee meeting on October 8, the surplus of \$119.83 was moved to the Undesignated Capital Reserves Fund.

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### **FY26 (current year) Projections - September 1, 2025 - August 31, 2026 based on March 31, 2026 actuals**

A **net operating loss of \$26,673 is projected** for this fiscal year. This is \$10,868 **MORE** than the budgeted loss of \$15,805 which the congregation approved by vote at the last Annual Meeting in May 2025.

#### Income – projecting \$15.3K less than budgeted

- Income from Individuals is estimated to be under budget by \$15.3K given that some portion of pledge payments will arrive late, i.e., after the close of the fiscal year on August 31st. The timely payment of your pledge could have a positive effect on how FY26 wraps up.
- Income from investments is estimated to exceed budget by over \$2K due to favorable interest rates.
- A source of unexpected but welcome income will be an additional \$5.7K from building rentals this summer.
- Another source of \$2.5K in unanticipated income is from fees for OWL and WUSYG activities.
- We had some very successful fundraising. The inaugural run of the Haunted House event netted \$4.8K towards general operations (and \$2K for WUSYG). The Open House/Crafting Kindness Marketplace brought in \$5.2K. Still, we estimate falling \$10K short of our fundraising goal of \$20K.
- 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 \$9,000 from the concert series.

Expenses – projecting \$4.5K less than budgeted

- Staff compensation represents 70% of church expenses. While there were increases in benefit costs for Rev. Seth and Mike Bussell, we spent less on benefits for administrator Stacey Katz who enjoys healthcare coverage under her spouse’s plan. Due to Joe Corricelli’s retirement, sexton pay is under budget. Due to the late hire of our Youth Assistant, we saved on costs. On the flip side, we estimate our costs for livestream technical service to exceed budget. These combined factors are estimated to save \$11.6K in staffing costs.
- Our Building & Grounds costs are estimated to exceed budget by \$28K. Of note are overages in snow removal (\$12K – more than double the budget), grounds maintenance (\$4.7K), cleaning (\$3.1 K due to hiring a cleaning service after Joe C’s retirement), and electricity (\$5.2K - due to start-up delays with our new solar panels, payments towards our solar panel loan, and heavy snowfall dampening energy production by the panels).
- Office operations are projected to be about \$16.7K under budget. Office expenses were trimmed by canceling subscriptions for unused services. The biggest savings of \$12K was in curtailed minister search costs.
- Several committees have not utilized the funds they were allocated, saving over \$4,000. 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, \$15.3 less in income and \$4.5K less in expenses, when added to the deficit \$15.8K budget passed in May 2025, brings us to a **projected net loss of \$26,673**. We plan to cover this deficit using funds from Capital Reserves, specifically \$10,000 from the Stabilization Fund to cover Snow Removal overages and \$16,673 from the Undesignated Fund to cover the rest. We estimate that this leaves reserves of \$48,852 moving into fiscal year FY27.

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**FY27 Proposed Budget (September 1, 2026 - August 31, 2027) approved by Standing Committee on April 21, 2026**

Capital Reserves	Aug 31, 2025	Projected for Aug 31, 2026
Undesignated	\$31,125	\$14,452
Project Escrow	11,350	11,350
Stabilization	10,000	0
Sabbatical Escrow	23,050	23,050
Fundraising Escrow	0	0
Building Carry-Forward	0	0
<b>Total Reserves</b>	<b>\$75,525</b>	<b>\$48,852</b>

Your Standing Committee (SC) is pleased to propose a net-zero budget for FY27 which begins Sept 1, 2026, and runs through August 31, 2027. It was an iterative process involving the budget team, personnel committee, program staff, program committees, pledge team, fundraising leaders, and approval by the SC on May 1. We are presenting this budget for approval by congregational vote at our 2026 Annual Meeting.

## 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 \$8K 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 robust summer camp rentals. We estimate \$12K in increased revenue.
- Fundraising and the Concert Series are also significant revenue sources. Our Concert Series will be entering its 21st season. We have three fundraisers planned – our second Haunted House, the Crafting Kindness marketplace, and a Town Day 2027 rummage sale. These efforts will bring us to a net-zero budget!
- OWL participant fees are estimated to bring in \$2.5K.

## Expenses –

- Personnel costs (about 70% of annual church expenses)
  - 1.4% cost of living adjustment (COLA) from January 2025 to January 2026 for the Boston metro area as published by the Bureau of Labor Statistics was applied as a starting point for staff comp increases.
  - Staff compensation was reviewed relative to UUA MIN/MID/MAX guidelines for churches of similar size in the Boston metro area and following MA state minimum wage laws. Adjustments were made to compensation for Sam Wilson and Brenna Mayer to bring them closer to the MID range for their experience level.
  - Sam Wilson has for many years bought his own health insurance through the Massachusetts Health Connector because it was more economical for him than the UUA Insurance plan. WUS has been very grateful for this arrangement. With healthcare costs rising so dramatically, Sam needs to switch to UUA coverage during the open enrollment period for 2027 resulting in over \$10K in increased benefit costs for Sam.
  - John Kramer has requested sabbatical leave from January to March 2027 during which time he will continue to receive his regular wages. We estimate the cost of a substitute during this period at \$7,500 which will be paid using funds from the Sabbatical Escrow account under Capital Reserves.
- Building/grounds expenses have been estimated \$24.5K higher to better align with the average of expenses over the previous five years and to plan for the increases in utility rates. We are hoping our upgraded solar panels will provide savings in electrical costs while we pay down the UCC Cornerstone loan for the project.
- Our fair share dues to the UUA Annual Program Fund will increase by \$2K commensurate with our own increased expenses.
- Social Action Committee and Share the Plate grants have been calculated at 5% of budget.

For FY27, total proposed expenses of \$878,739 exceed proposed ordinary income of \$871,239 by \$7,500 which will be pulled from the Sabbatical Escrow Fund. This results in a net-zero budget. The estimated balances in capital reserve funds at the end of FY27 are indicated in the table below:

Capital Reserves	Projected for Aug 31, 2026	Estimated Aug 31, 2027
Undesignated	\$14,452	\$14,452
Project Escrow	11,350	11,350
Stabilization	0	0
Sabbatical Escrow	23,050	15,550
Fundraising Escrow	0	0
Building Carry-Forward	0	0
Total Reserves	\$48,852	\$41,352

## Winchester Unitarian Society Balance Sheet

	As of March 31, 2026	As of Aug 31, 2025	As of Aug 31, 2024
<b>ASSETS</b>			
<b>Current Assets</b>			
<b>Bank Accounts</b>			
1010 Winchester Savings Ops Checking	76,093.62	72,031.62	1,812.12
1020 Winchester Savings CDs	80,305.90	78,510.19	75,319.35
1030 Needham Bank CD 1	22,523.55	21,989.75	21,036.81
1040 Needham Bank CD 2	70,222.35	68,529.46	65,406.52
1050 Winchester Savings MDF checking	5,707.12	5,309.81	4,765.16
1060 Winchester Savings Money Market	128,565.07	141,784.05	59,126.37
<b>Total Bank Accounts</b>	<b>\$ 383,417.61</b>	<b>\$ 388,154.88</b>	<b>\$ 227,466.33</b>
<b>Total Current Assets</b>	<b>\$ 383,417.61</b>	<b>\$ 388,154.88</b>	<b>\$ 227,466.33</b>
<b>TOTAL ASSETS</b>	<b>\$ 383,417.61</b>	<b>\$ 388,154.88</b>	<b>\$ 227,466.33</b>
<b>LIABILITIES AND EQUITY</b>			
<b>Liabilities</b>			
<b>Current Liabilities</b>			
<b>Other Current Liabilities</b>			
<b>3000 Operating Funds</b>			
<b>3020 Capital Reserves</b>			
3021 Undesignated Capital Reserves	31,125.39	31,125.39	20,946.80
3022 Project Escrow (Web, Marketing, Audit)	11,350.00	11,350.00	11,350.00
3023 Stabilization (Snow, Utilities, etc.)	10,000.00	10,000.00	10,000.00
3024 Sabbatical Escrow	23,049.90	23,049.90	23,049.90
<b>Total 3020 Capital Reserves</b>	<b>\$ 75,525.29</b>	<b>\$ 75,525.29</b>	<b>\$ 65,346.70</b>
3050 Prepaid Pledges	19,394.77	71,345.00	56,475.00
<b>Total 3000 Operating Funds</b>	<b>\$ 94,920.06</b>	<b>\$ 146,870.29</b>	<b>\$ 121,821.70</b>
<b>3100 Building and Grounds</b>			
3105 UCC Cornerstone Solar Panels Loan	36,258.22	36,577.06	
3110 B&G Projects	10,768.05	83,566.00	(9,681.25)
3140 from Stone Window Fund	1,365.39	1,365.39	1,945.39
3150 from Meditation Garden Fund	8,803.59	7,830.59	6,673.59
<b>Total 3100 Building and Grounds</b>	<b>\$ 57,195.25</b>	<b>\$ 129,339.04</b>	<b>\$ (1,062.27)</b>
<b>3200 Flower Funds</b>			
3210 Flower Fund	1,124.65	1,518.65	2,547.64
3220 from Dawn Kelley Bartlett Fund	2,818.98	1,823.04	377.04
<b>Total 3200 Flower Funds</b>	<b>\$ 3,943.63</b>	<b>\$ 3,341.69</b>	<b>\$ 2,924.68</b>
3300 Memorial Fund	19,556.13	18,681.13	18,631.13
<b>3400 Music Funds</b>			
3450 Concert Series	13,184.38	2,502.06	2,029.45
3460 from Parkhurst Organ Fund	2,274.89	1,877.89	1,479.89
3470 from Sue Swap Fund	7,974.43	7,692.43	7,023.43
3480 Elora Trump Fund	766.05	766.05	766.05
3490 Harpsichord Fund	536.00	536.00	536.00
3491 from Cerny/Thomas Fund	2,382.06	1,832.06	1,908.22

<b>Total 3400 Music Funds</b>	<b>\$</b>	<b>29,617.81</b>	<b>\$</b>	<b>17,706.49</b>	<b>\$</b>	<b>16,243.04</b>
<b>3500 Outreach Funds</b>						
<b>3530 Share the Plate</b>		1,579.99		1,219.59		1,667.78
<b>3540 Reach Out</b>		595.29		3,513.76		464.88
<b>3550 Disaster Relief</b>		0.00		0.00		50.34
<b>Total 3500 Outreach Funds</b>	<b>\$</b>	<b>2,175.28</b>	<b>\$</b>	<b>4,733.35</b>	<b>\$</b>	<b>2,183.00</b>
<b>3600 RE Funds</b>						
<b>3630 from Nash Nursery Fund</b>		368.64		731.71		731.71
<b>3640 Our Whole Lives</b>		460.16		1,010.16		460.16
<b>3650 Coming of Age &amp; F8th in Action</b>		126.93		466.07		466.07
<b>Total 3600 RE Funds</b>	<b>\$</b>	<b>955.73</b>	<b>\$</b>	<b>2,207.94</b>	<b>\$</b>	<b>1,657.94</b>
<b>3700 Youth Funds</b>						
<b>3710 WUSYG Service Projects</b>		12,461.38		8,793.38		10,791.91
<b>3720 Church School Youth Fund</b>		89.57		62.57		35.57
<b>3730 from Sandy Fries Youth Fund</b>		780.91		780.91		780.91
<b>Total 3700 Youth Funds</b>	<b>\$</b>	<b>13,331.86</b>	<b>\$</b>	<b>9,636.86</b>	<b>\$</b>	<b>11,608.39</b>
<b>3800 Other Funds</b>						
<b>3805 SC Projects</b>		4,269.14		4,269.14		7,746.17
<b>3820 Pastoral Care Ministry</b>		4,999.06		4,999.06		4,999.06
<b>3840 from Student Minister Fund</b>		40,155.27		40,155.27		40,155.27
<b>3850 Green Sanctuary Carbon Offset</b>		3,530.00		3,530.00		2,230.00
<b>3870 Yoga Fund</b>		1,427.00		300.00		0.00
<b>3890 Contra</b>		2,544.94		(2,925.19)		(8,864.72)
<b>3895 Minister Discretionary Fund</b>		5,707.12		5,309.81		4,765.16
<b>Total 3800 Other Funds</b>	<b>\$</b>	<b>62,632.53</b>	<b>\$</b>	<b>55,638.09</b>	<b>\$</b>	<b>51,030.94</b>
<b>3900 Uncleared WSB Ops Checks</b>		0.00		0.00		2,427.78
<b>Total Other Current Liabilities</b>	<b>\$</b>	<b>284,328.28</b>	<b>\$</b>	<b>388,154.88</b>	<b>\$</b>	<b>227,466.33</b>
<b>Total Current Liabilities</b>	<b>\$</b>	<b>284,328.28</b>	<b>\$</b>	<b>388,154.88</b>	<b>\$</b>	<b>227,466.33</b>
<b>Total Liabilities</b>	<b>\$</b>	<b>284,328.28</b>	<b>\$</b>	<b>388,154.88</b>	<b>\$</b>	<b>227,466.33</b>
<b>Equity</b>						
<b>Retained Earnings</b>		0.00		0.00		0.00
<b>Net Income</b>		99,089.33		0.00		0.00
<b>Total Equity</b>	<b>\$</b>	<b>99,089.33</b>	<b>\$</b>	<b>-</b>	<b>\$</b>	<b>-</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$</b>	<b>383,417.61</b>	<b>\$</b>	<b>388,154.88</b>	<b>\$</b>	<b>227,466.33</b>

**Balance Sheet Accounts Activity - FY25 through August 31, 2025 and FY26 thru March 31, 2026**

Account Name	Acct#	Balance - Aug 31, 2024	FY25 Receipts	FY25 Disbursements	Balance - Aug 31, 2025	FY26 Receipts thru 3/31/26	FY26 Disbursements thru 3/31/26	Balance - March 31, 2026
Undesignated Capital Reserves	3021	20,946.80	10,178.59	0.00	31,125.39	0.00	0.00	31,125.39
Project Escrow (Web, Marketing, Audit)	3022	11,350.00	0.00	0.00	11,350.00	0.00	0.00	11,350.00
Stabilization (Snow, Utilities, etc.)	3023	10,000.00	0.00	0.00	10,000.00	0.00	0.00	10,000.00
Sabbatical Escrow	3024	23,049.90	0.00	0.00	23,049.90	0.00	0.00	23,049.90
Prepaid Pledges	3050	56,475.00	71,345.00	(56,475.00)	71,345.00	19,349.77	(71,345.00)	19,349.77
UCC Cornerstone Solar Panels Loan	3105	0.00	36,800.00	(222.94)	36,577.06	0.00	(318.84)	36,258.22
B&G Projects	3110	(9,681.25)	195,235.37	(101,988.12)	83,566.00	2,331.54	(75,129.49)	10,768.05
Stone Window Fund	3140	1,945.39	0.00	(580.00)	1,365.39	0.00	0.00	1,365.39
Meditation Garden Fund	3150	6,673.59	1,157.00	0.00	7,830.59	973.00	0.00	8,803.59
Flower Fund	3210	2,547.64	833.00	(1,861.99)	1,518.65	881.00	(1,275.00)	1,124.65
Dawn Kelley Bartlett Fund	3220	377.04	1,446.00	0.00	1,823.04	1,442.00	(446.06)	2,818.98
Memorial Fund	3300	18,631.13	15,050.00	(15,000.00)	18,681.13	875.00	0.00	19,556.13
Music Funds	3400	2,500.00	0.00	0.00	2,500.00	0.00	0.00	2,500.00
Concert Series	3450	2,029.45	16,183.00	(15,710.39)	2,502.06	15,496.01	(4,813.69)	13,184.38
Parkhurst Organ Fund	3460	1,479.89	398.00	0.00	1,877.89	397.00	0.00	2,274.89
Sue Swap Fund	3470	7,023.43	5,354.03	(4,685.03)	7,692.43	3,732.00	(3,450.00)	7,974.43
Elora Trump Fund	3480	766.05	0.00	0.00	766.05	0.00	0.00	766.05
Harpichord Fund	3490	536.00	0.00	0.00	536.00	0.00	0.00	536.00
Cerny/Thomasess Fund	3491	1,908.22	852.00	(928.16)	1,832.06	850.00	(300.00)	2,382.06
Share the Plate	3530	1,667.78	3,172.00	(3,620.19)	1,219.59	493.00	(132.60)	1,579.99
Reach Out	3540	464.88	3,509.04	(460.16)	3,513.76	1,300.00	(4,218.47)	595.29
Disaster Relief	3550	50.34	0.00	(50.34)	0.00	0.00	0.00	0.00
Nash Nursery Fund	3630	731.71	0.00	0.00	731.71	0.00	(363.07)	368.64
Our Whole Lives	3640	460.16	550.00	0.00	1,010.16	0.00	(550.00)	460.16
Coming of Age & F8th in Action	3650	466.07	0.00	0.00	466.07	0.00	(339.14)	126.93
WUSYG Service Projects	3710	10,791.91	6,947.31	(8,945.84)	8,793.38	3,668.00	0.00	12,461.38
Church School Youth Fund	3720	35.57	27.00	0.00	62.57	27.00	0.00	89.57
Sandy Fries Youth Fund	3730	780.91	0.00	0.00	780.91	0.00	0.00	780.91
SC Projects	3805	7,746.17	0.00	(3,477.03)	4,269.14	0.00	0.00	4,269.14
Pastoral Care Ministry	3820	4,999.06	0.00	0.00	4,999.06	0.00	0.00	4,999.06
Student Minister Fund	3840	40,155.27	0.00	0.00	40,155.27	0.00	0.00	40,155.27
Green Sanctuary Carbon Offset	3850	2,230.00	1,300.00	0.00	3,530.00	0.00	0.00	3,530.00
Yoga Fund	3870	0.00	1,180.00	(880.00)	300.00	1,127.00	0.00	1,427.00
Contra	3890	(8,864.72)	12,751.38	(6,811.85)	(2,925.19)	18,581.96	(13,111.83)	2,544.94
Minister Discretionary Fund	3895	4,765.16	2,810.00	(2,265.35)	5,309.81	397.31	0.00	5,707.12
<b>Total</b>		<b>225,038.55</b>	<b>387,078.72</b>	<b>(223,962.39)</b>	<b>388,154.88</b>	<b>71,921.59</b>	<b>(175,793.19)</b>	<b>284,283.28</b>

<b>Budget Categories - detailed view</b>		<b>FY25 Budget voted 5/19/2024</b>	<b>FY25 Actual as of 8/31/2025</b>	<b>FY26 Budget voted 5/19/2025</b>	<b>FY26 Actual as of 3/31/2026</b>	<b>FY26 Projected through 8/31/2026</b>	<b>FY27 Budget SC approved 5/1/2026</b>
<b>2</b>	<b>INCOME</b>						
<b>3</b>	<b>4100 INDIVIDUALS</b>						
4	4110 Current Year Pledges	\$412,000	\$388,749	\$430,000	\$321,522	\$415,000	\$450,800
5	4140 Matching	\$19,280	\$18,880				
6	4150 Prior Year Pledges (Late payments)	\$4,000	\$23,102	\$12,000	\$14,040	\$14,040	\$15,000
7	4160 Contributions - non-pledge	\$6,500	\$1,265	\$3,000	\$2,050	\$2,929	\$3,000
8	4170 Sunday Collection - non-pledge	\$15,000	\$20,146	\$20,000	\$12,522	\$17,332	\$20,000
9	4180 Sunday Collection - Share the Plate	\$20,000	\$24,453	\$22,000	\$19,025	\$22,000	\$24,000
10	4190 Electronic funds & stock transfer fees	(\$1,200)	(\$1,387)	(\$1,200)	(\$875)	(\$1,200)	(\$1,200)
11	<b>TOTAL 4100 INCOME FROM INDIVIDUALS</b>	<b>\$475,580</b>	<b>\$475,208</b>	<b>\$485,800</b>	<b>\$368,284</b>	<b>\$470,101</b>	<b>\$511,600</b>
12	<b>% OF TOTAL INCOME</b>	<b>59.6%</b>	<b>57.9%</b>	<b>59.8%</b>	<b>64.0%</b>	<b>58.9%</b>	<b>58.7%</b>
<b>13</b>	<b>4200 INVESTMENTS</b>						
14	4210 Bank Interest	\$8,400	\$9,924	\$7,800	\$5,803	\$9,949	\$9,000
15	4220 Downs Income	\$12,580	\$12,580	\$12,580	\$9,435	\$12,580	\$12,580
16	4230 Meyer Income	\$57,600	\$57,600	\$57,600	\$33,600	\$57,600	\$57,600
17	4240 Trustees PermFunds-Unrestricted	\$124,762	\$124,762	\$127,857	\$63,400	\$127,857	\$135,077
18	4250 Trustees PermFunds-Building/Eustis Fund	\$929	\$929	\$950	\$926	\$926	\$996
19	4260 Trustees PermFunds-Cook Funds	\$9,480	\$9,480	\$9,500	\$9,457	\$9,457	\$10,163
20	4265 Trustees PermFunds-Baldwins Fund	\$3,077	\$3,077	\$3,100	\$3,070	\$3,070	\$3,299
21	<b>TOTAL 4200 INCOME FROM INVESTMENTS</b>	<b>\$216,828</b>	<b>\$218,352</b>	<b>\$219,387</b>	<b>\$125,691</b>	<b>\$221,439</b>	<b>\$228,715</b>
22	<b>% OF TOTAL INCOME</b>	<b>27.2%</b>	<b>26.6%</b>	<b>27.0%</b>	<b>21.8%</b>	<b>27.8%</b>	<b>26.3%</b>
<b>23</b>	<b>4300 BUILDING USE</b>						
24	4310 Winchester Cooperative Nursery School	\$38,253	\$38,253	\$40,930	\$40,930	\$40,930	\$43,795
25	4320 Winch. School of Chinese Culture	\$21,824	\$22,500	\$23,352	\$20,176	\$23,352	\$26,985
26	4330 Yoga	\$3,000	\$880	\$2,500		\$1,500	\$1,500
27	4340 Other Building Use	\$14,500	\$19,635	\$12,000	\$7,765	\$18,720	\$18,500
28	<b>TOTAL 4300 INCOME FROM BUILDING USE</b>	<b>\$77,577</b>	<b>\$81,268</b>	<b>\$78,782</b>	<b>\$68,871</b>	<b>\$84,502</b>	<b>\$90,781</b>
29	<b>% OF TOTAL INCOME</b>	<b>9.7%</b>	<b>9.9%</b>	<b>9.7%</b>	<b>12.0%</b>	<b>10.6%</b>	<b>10.4%</b>
<b>30</b>	<b>4400 OTHER SOURCES</b>						
31	4410 Fundraising Events	\$20,000	\$34,584	\$20,000	\$10,009	\$10,009	\$28,143
32	4420 Concert Series	\$8,000	\$11,500	\$9,000		\$9,000	\$9,000
33	4490 Fees - RE, OWL, WUSYG				\$2,590	\$2,590	\$3,000
34	<b>TOTAL 4400 INCOME OTHER SOURCES</b>	<b>\$28,000</b>	<b>\$46,084</b>	<b>\$29,000</b>	<b>\$12,599</b>	<b>\$21,599</b>	<b>\$40,143</b>
35	<b>% OF TOTAL INCOME</b>	<b>3.5%</b>	<b>5.6%</b>	<b>3.6%</b>	<b>2.2%</b>	<b>2.7%</b>	<b>4.6%</b>
<b>36</b>	<b>TOTAL INCOME</b>	<b>\$797,985</b>	<b>\$820,912</b>	<b>\$812,969</b>	<b>\$575,445</b>	<b>\$797,641</b>	<b>\$871,239</b>
<b>37</b>	<b>EXPENSES</b>						
<b>38</b>	<b>5000 STAFF</b>						
<b>40</b>	<b>5100 MINISTERIAL</b>						
41	5111 Lead Minister Salary - 1.0 FTE	\$67,500	\$77,910	\$74,701	\$43,452	\$75,043	\$113,500
42	5112 Lead Minister Housing	\$35,000	\$30,723	\$37,170	\$20,954	\$36,692	\$0
43	5113 Lead Minister in lieu FICA/LTD/Life/Health/Pension/Dental	\$40,718	\$39,240	\$41,472	\$24,656	\$43,183	\$45,351
44	5114 Lead Minister Prof Exp	\$10,000	\$9,853	\$11,000	\$2,464	\$11,000	\$11,350
45	5130 Summer Minister		\$2,000	\$1,000		\$1,000	\$1,000
46	5140 Sunday Speakers	\$1,000	\$1,925	\$3,000	\$2,310	\$3,080	\$3,000
47	<b>TOTAL 5100 MINISTERIAL</b>	<b>\$154,218</b>	<b>\$161,651</b>	<b>\$168,343</b>	<b>\$93,836</b>	<b>\$169,998</b>	<b>\$174,201</b>
48	<b>% OF TOTAL STAFF</b>	<b>26.8%</b>	<b>28.2%</b>	<b>28.8%</b>	<b>28.7%</b>	<b>29.7%</b>	<b>28.5%</b>
49	<b>% OF TOTAL EXPENSES</b>	<b>19.2%</b>	<b>19.7%</b>	<b>20.3%</b>	<b>19.7%</b>	<b>20.6%</b>	<b>19.8%</b>
<b>50</b>	<b>5200 ADMINISTRATION</b>						
51	5211 Administrator Salary - 1.0 FTE	\$60,060	\$62,426	\$62,012	\$36,080	\$63,157	\$65,000
52	5212 Admin FICA, LTD, Life, Pension, Health	\$36,342	\$22,320	\$16,205	\$7,680	\$13,063	\$12,864
53	5213 Admin Professional Expenses	\$1,000	\$473	\$1,000	\$283	\$1,000	\$1,000
54	5221 Bookkeeper/Office Asst. - 0.65 FTE (48 wk@28hrs)	\$32,852	\$45,622	\$44,045	\$27,469	\$44,045	\$44,688
55	5222 Bookkeeper/Admin. Assist. FICA & Benefits	\$16,588	\$11,430	\$7,774	\$5,095	\$7,774	\$8,844
56	5231 Sextons	\$42,698	\$44,739	\$43,200	\$21,062	\$34,215	\$31,700
57	5232 Sextons FICA & life/ltd/retirement	\$3,266	\$3,432	\$3,305	\$2,258	\$4,630	\$5,228
58	<b>TOTAL 5200 ADMINISTRATION</b>	<b>\$192,806</b>	<b>\$190,443</b>	<b>\$177,541</b>	<b>\$99,927</b>	<b>\$167,884</b>	<b>\$169,323</b>
59	<b>% OF TOTAL STAFF</b>	<b>33.5%</b>	<b>33.2%</b>	<b>30.4%</b>	<b>30.6%</b>	<b>29.3%</b>	<b>27.7%</b>
60	<b>% OF TOTAL EXPENSES</b>	<b>24.0%</b>	<b>23.2%</b>	<b>21.4%</b>	<b>21.0%</b>	<b>20.4%</b>	<b>19.3%</b>

<b>Budget Categories - detailed view</b>		<b>FY25 Budget</b>	<b>FY25 Actual</b>	<b>FY26 Budget</b>	<b>FY26 Actual</b>	<b>FY26 Projected</b>	<b>FY27 Budget</b>
<b>61</b>	<b>5300 RELIGIOUS EDUCATION for Families and Youth</b>						
62	5411 Dir. Youth & Children Ministries (DYCM) Salary	\$73,951	\$73,855	\$76,354	\$44,035	\$76,423	\$79,000
63	5413 DYCM FICA, LTD, Life, Pension, Dental	\$15,355	\$15,229	\$15,891	\$9,230	\$16,030	\$27,258
64	5414 DYCM Prof. Expense	\$6,300	\$5,525	\$6,300	\$4,367	\$6,300	\$6,300
65	5311 RE Coordinator (REC) Salary - .468 FTE	\$25,875	\$25,954	\$26,716	\$15,381	\$26,684	\$29,500
66	5312 REC FICA, LTD, Life	\$2,553	\$2,386	\$2,615	\$1,550	\$2,675	\$2,888
67	5313 REC prof. expenses	\$2,588	\$2,501	\$2,670	\$240	\$2,670	\$2,950
68	5421 Youth Assistant - 43 weeks of 5 hrs/wk plus 100 hrs	\$5,847	\$4,541	\$6,038	\$1,020	\$4,290	\$6,458
69	5422 Youth Assistant Service Trip	\$2,400		\$2,400			
70	5423 Youth Assistant FICA	\$631	\$349	\$645	\$86	\$328	\$494
71	5340 RE Program Assistant/Nursery - Wages & FICA	\$2,568			\$1,069	\$3,269	\$3,200
72	5350 RE Teachers, Aides - Wages & FICA	\$9,500	\$12,799	\$8,150	\$5,534	\$8,860	\$8,800
73	5355 Childcare			\$6,750	\$1,594	\$4,000	\$4,000
74	<b>TOTAL 5300 RELIGIOUS EDUCATION</b>	<b>\$147,568</b>	<b>\$143,139</b>	<b>\$154,529</b>	<b>\$84,104</b>	<b>\$151,529</b>	<b>\$170,848</b>
75	<b>% OF TOTAL STAFF</b>	<b>25.6%</b>	<b>24.9%</b>	<b>26.4%</b>	<b>25.7%</b>	<b>26.4%</b>	<b>28.0%</b>
76	<b>% OF TOTAL EXPENSES</b>	<b>18.4%</b>	<b>17.4%</b>	<b>18.6%</b>	<b>17.7%</b>	<b>18.4%</b>	<b>19.4%</b>
<b>77</b>	<b>5500 MUSIC</b>						
78	5511 Director Salary - 21 hrs/wk (0.525 FTE)	\$47,623	\$47,564	\$49,170	\$28,308	\$49,110	\$50,000
79	5512 Director FICA, LTD, Life, Pension	\$9,405	\$9,308	\$9,731	\$5,667	\$9,795	\$9,895
80	5513 Director Professional Exp.	\$2,150		\$2,150		\$2,150	\$2,150
81	5519 Substitute staff during sabbatical						\$7,500
82	5530 Soloists, Substitutes, and Section Leaders	\$18,336	\$15,976	\$18,932	\$11,865	\$17,487	\$22,284
83	5540 Other Musicians	\$500	\$1,025	\$500	\$200	\$500	\$500
84	<b>TOTAL 5500 MUSIC</b>	<b>\$78,014</b>	<b>\$73,873</b>	<b>\$80,483</b>	<b>\$46,040</b>	<b>\$79,042</b>	<b>\$92,329</b>
85	<b>% OF TOTAL STAFF</b>	<b>13.5%</b>	<b>12.9%</b>	<b>13.8%</b>	<b>14.1%</b>	<b>13.8%</b>	<b>15.1%</b>
86	<b>% OF TOTAL EXPENSES</b>	<b>9.7%</b>	<b>9.0%</b>	<b>9.7%</b>	<b>9.7%</b>	<b>9.6%</b>	<b>10.5%</b>
87	<b>5600 Livestream Coordinators</b>	\$3,750	\$4,625	\$3,750	\$2,735	\$4,635	\$4,160
88	<b>% OF TOTAL STAFF</b>	<b>0.7%</b>	<b>0.8%</b>	<b>0.6%</b>	<b>0.8%</b>	<b>0.8%</b>	<b>0.7%</b>
89	<b>% OF TOTAL EXPENSES</b>	<b>0.5%</b>	<b>0.6%</b>	<b>0.5%</b>	<b>0.6%</b>	<b>0.6%</b>	<b>0.5%</b>
90	<b>TOTAL STAFF</b>	<b>\$576,356</b>	<b>\$573,731</b>	<b>\$584,646</b>	<b>\$326,641</b>	<b>\$573,088</b>	<b>\$610,861</b>
93	<b>% STAFF OF TOTAL EXPENSES</b>	<b>71.8%</b>	<b>69.9%</b>	<b>70.5%</b>	<b>70.5%</b>	<b>69.5%</b>	<b>69.5%</b>
<b>95</b>	<b>6000 BUILDING &amp; GROUNDS</b>						
96	6110 Grounds	\$4,000	\$10,019	\$5,000	\$2,950	\$9,705	\$10,000
97	6120 Snow Removal	\$9,000	\$12,318	\$9,000	\$21,893	\$21,893	\$10,000
98	6130 Church Maintenance	\$42,000	\$46,149	\$42,000	\$24,048	\$42,000	\$46,000
99	6140 Furnishings	\$1,000		\$1,200	\$1,399	\$1,399	\$1,200
100	6150 Cleaning & Paper Supplies	\$2,500	\$1,994	\$2,000	\$2,498	\$5,148	\$12,000
101	6160 Gas	\$24,000	\$33,248	\$30,000	\$22,425	\$30,599	\$30,000
102	6170 Electricity	\$7,000	\$6,277	\$2,000	\$3,710	\$7,198	\$6,500
103	6180 Water and Sewer	\$8,000	\$7,089	\$8,500	\$8,636	\$9,790	\$8,500
104	<b>TOTAL 6000 BLDG &amp; GROUNDS</b>	<b>\$97,500</b>	<b>\$117,092</b>	<b>\$99,700</b>	<b>\$87,559</b>	<b>\$127,732</b>	<b>\$124,200</b>
105	<b>% BLDG-GRNDS/TOTAL EXPENSES</b>	<b>12.1%</b>	<b>14.3%</b>	<b>12.0%</b>	<b>18.4%</b>	<b>15.5%</b>	<b>14.1%</b>
<b>106</b>	<b>6500 OPERATIONS</b>						
<b>107</b>	<b>6510 FINANCIAL</b>						
108	6511 Financial Review	\$0		\$0	\$0	\$0	\$0
109	6512 Insurance	\$21,000	\$20,264	\$20,000	\$7,982	\$20,000	\$20,000
110	<b>TOTAL 6510 FINANCIAL</b>	<b>\$21,000</b>	<b>\$20,264</b>	<b>\$20,000</b>	<b>\$7,982</b>	<b>\$20,000</b>	<b>\$20,000</b>
<b>111</b>	<b>6520 OFFICE EXPENSES</b>						
112	6521 Office Equipment	\$2,800	\$2,459	\$3,000	\$2,863	\$3,068	\$3,000
113	6522 Office Operations	\$12,500	\$15,631	\$7,000	\$7,571	\$10,720	\$10,500
114	6524 Phone & Internet	\$6,000	\$6,310	\$13,500	\$3,162	\$5,447	\$5,500
115	6525 Web, Marketing, Publicity	\$2,500		\$1,000	\$188	\$665	\$1,000
116	<b>TOTAL 6520 OFFICE EXPENSES</b>	<b>\$23,800</b>	<b>\$24,401</b>	<b>\$24,500</b>	<b>\$13,784</b>	<b>\$19,900</b>	<b>\$20,000</b>
<b>117</b>	<b>6540 STAFF HIRING &amp; SUPPORT</b>						
118	6541 Staff meetings, retreats, acknowledgements	\$1,200	\$1,204	\$1,200	\$111	\$111	\$1,200
119	6542 Search/Transition	\$4,000	\$3,184	\$15,000	\$1,745	\$3,969	\$15,000
120	<b>TOTAL 6540 STAFF HIRING-SUPPORT</b>	<b>\$5,200</b>	<b>\$4,388</b>	<b>\$16,200</b>	<b>\$1,856</b>	<b>\$4,080</b>	<b>\$16,200</b>
<b>121</b>	<b>6550 DENOMINATIONAL AFFAIRS</b>						

	<b>Budget Categories - detailed view</b>	<b>FY25 Budget</b>	<b>FY25 Actual</b>	<b>FY26 Budget</b>	<b>FY26 Actual</b>	<b>FY26 Projected</b>	<b>FY27 Budget</b>
122	6551 UUA Annual Program Fund	\$30,500	\$32,353	\$31,238	\$15,642	\$31,238	\$32,878
123	6552 Contributions: Other Organizations	\$500			\$250	\$250	\$500
124	6555 Conferences (GA, NER, etc.)			\$500			\$500
125	<b>TOTAL 6550 DENOM. AFFAIRS</b>	<b>\$31,000</b>	<b>\$32,353</b>	<b>\$31,738</b>	<b>\$15,892</b>	<b>\$31,488</b>	<b>\$33,878</b>
126	<b>TOTAL 6500 OPERATIONS</b>	<b>\$81,000</b>	<b>\$81,406</b>	<b>\$92,438</b>	<b>\$39,513</b>	<b>\$75,468</b>	<b>\$90,078</b>
127	<b>% OPERATIONS/TOTAL EXPENSES</b>	<b>10.1%</b>	<b>9.9%</b>	<b>11.2%</b>	<b>8.3%</b>	<b>9.2%</b>	<b>10.3%</b>
128	<b>7000 PROGRAMS &amp; COMMITTEES</b>						
129	7212 Chime Playing and Maint	\$500	\$500	\$500		\$500	\$500
130	7215 Organ/Piano Maint.	\$400		\$400			\$0
131	7217 Choral music & supplies	\$400		\$400		\$360	\$400
132	7220 RE Supplies and Curriculum	\$2,000	\$1,520	\$2,500	\$1,819	\$1,874	\$2,500
133	7225 OWL Programs	\$500	(\$633)	\$500	\$250	\$303	\$500
134	7230 WUSYG Program/Project	\$1,000	\$1,285	\$1,500	\$1,640	\$1,660	\$1,500
135	7235 Coming of Age	\$500	\$174	\$500			\$500
136	7240 Worship Supplies	\$750	\$676	\$750	\$377	\$377	\$700
137	7250 Fellowship	\$200	\$170	\$200	\$213	\$213	\$200
138	7260 Hospitality	\$1,000	\$1,303	\$1,000	\$811	\$848	\$1,000
139	7270 Membership	\$1,500	\$583	\$1,500	\$26	\$141	\$1,500
140	7280 Grief Grp. & PCAs	\$200		\$200			\$100
141	7285 Small Group Ministry	\$100		\$100	\$249	\$249	\$100
142	7290 Leadership Development	\$100	\$87	\$100	\$94	\$94	\$100
143	7296 Green Sanctuary	\$200		\$200			\$100
144	7299 Social Action Supplies	\$500	\$448	\$500	\$354	\$354	\$500
145	7610 Standing Committee	\$220		\$220			\$200
146	7620 Sp. Proj./Vision Initiatives	\$220		\$220	\$453	\$453	\$0
147	7630 SFC / Planned Giving	\$100		\$100			\$0
148	<b>TOTAL 7000 PROGRAMS &amp; COMMITTEES</b>	<b>\$10,390</b>	<b>\$6,111</b>	<b>\$11,390</b>	<b>\$6,286</b>	<b>\$7,426</b>	<b>\$10,400</b>
149	<b>% PROGRAMS/TOTAL EXPENSES</b>	<b>1.3%</b>	<b>0.7%</b>	<b>1.4%</b>	<b>1.3%</b>	<b>0.9%</b>	<b>1.2%</b>
150	<b>7800 SOCIAL OUTREACH GRANTS</b>						
151	7810 SAOC Committee Grants	\$18,000	\$18,000	\$18,600		\$18,600	\$19,200
152	7820 SAOC Share the Plate Grants	\$20,000	\$24,453	\$22,000	\$16,356	\$22,000	\$24,000
153	<b>TOTAL 7800 GRANTS</b>	<b>\$38,000</b>	<b>\$42,453</b>	<b>\$40,600</b>	<b>\$16,356</b>	<b>\$40,600</b>	<b>\$43,200</b>
154	<b>% SOC GRANTS/TOTAL EXPENSES</b>	<b>5%</b>	<b>5%</b>	<b>5%</b>	<b>3%</b>	<b>5%</b>	<b>5%</b>
155	<b>TOTAL EXPENSES</b>	<b>\$803,246</b>	<b>\$820,792</b>	<b>\$828,774</b>	<b>\$476,356</b>	<b>\$824,314</b>	<b>\$878,739</b>
157	<b>NET OPERATING INCOME (LOSS)</b>	<b>(\$5,261)</b>	<b>\$120</b>	<b>(\$15,805)</b>	<b>\$99,089</b>	<b>(\$26,673)</b>	<b>(\$7,500)</b>
159	<b>OTHER INCOME</b>						
160	8020 From Undesignated Operational Reserve	\$5,261		\$15,805		\$16,673	\$0
163	8050 From Stabilization (Snow, Utilities, etc.)					\$10,000	
165	8070 From Sabbatical Escrow						\$7,500
166	<b>TOTAL OTHER INCOME</b>	<b>\$5,261</b>	<b>\$0</b>	<b>\$15,805</b>	<b>\$0</b>	<b>\$26,673</b>	<b>\$7,500</b>
168	<b>OTHER EXPENSES</b>						
169	9020 To Undesignated Operational Reserve		\$120				
175	<b>TOTAL OTHER EXPENSES</b>	<b>\$0</b>	<b>\$120</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
177	<b>NET OTHER INCOME (LOSS)</b>	<b>\$5,261</b>	<b>(\$120)</b>	<b>\$15,805</b>	<b>\$0</b>	<b>\$26,673</b>	<b>\$7,500</b>
178	<b>ADJUSTED OPERATING INCOME (LOSS)</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$99,089</b>	<b>\$0</b>	<b>\$0</b>

		Approved FY26 Budget	Projected thru 8/31/2026	FY27 Budget proposed by SC 5/1/2026
1	<b>Winchester Unitarian Society Budget Categories</b>			
2	<b>INCOME</b>			
3	Pledge payments for current year and late payments for prior year	\$442,000	\$429,040	\$465,800
4	Non-pledge contributions	\$23,000	\$20,261	\$23,000
5	Share the Plate	\$22,000	\$22,000	\$24,000
6	Electronic payment & stock transfer fees	(\$1,200)	(\$1,200)	(\$1,200)
7	Bank Interest	\$7,800	\$9,949	\$9,000
8	Trusts & WUS Endowment disbursements	\$211,587	\$211,490	\$219,715
9	Building Use	\$78,782	\$84,502	\$90,780
10	Fundraising Events	\$20,000	\$10,009	\$28,143
11	Concert Series	\$9,000	\$9,000	\$9,000
12	Fees - RE, OWL, WUSYG		\$2,590	\$3,000
13	<b>TOTAL INCOME</b>	<b>\$812,969</b>	<b>\$797,641</b>	<b>\$871,239</b>
14				
15	<b>EXPENSES</b>			
16	Interim Minister Salary, Housing, Benefits, Professional Expenses	\$164,343	\$165,919	\$170,201
17	Summer Minister, Sunday Speakers	\$4,000	\$4,080	\$4,000
18	Administrator Salary, Benefits, Professional Expenses	\$79,217	\$77,220	\$78,864
19	Bookkeeper/Office Asst. Salary and Benefits	\$51,819	\$51,819	\$53,531
20	Sextons Salary and Benefits	\$46,505	\$38,844	\$36,928
21	Director Youth & Children Salary, Benefits, Professional Expenses	\$98,546	\$98,753	\$112,558
22	RE Coordinator Salary, Benefits, Professional Expenses	\$32,001	\$32,028	\$35,338
23	Youth & RE Assistants & Childcare	\$23,983	\$20,747	\$22,952
24	Music Director Salary, Benefits, Professional Expenses	\$61,051	\$61,055	\$62,045
25	Substitute during Music Director Sabbatical			\$7,500
26	Substitutes, and Soloists/Choir Section Leaders	\$19,432	\$17,987	\$22,784
27	Livestream Coordinators	\$3,750	\$4,635	\$4,160
28	Grounds maintenance & Snow removal	\$14,000	\$31,598	\$20,000
29	Building Maintenance	\$42,000	\$42,000	\$46,000
30	Furnishings, Cleaning Service, Paper Supplies	\$3,200	\$6,548	\$13,200
31	Utilities - Gas, Electric, Water & Sewer	\$40,500	\$47,587	\$45,000
32	Insurance	\$20,000	\$20,000	\$20,000
33	Office Expenses	\$25,700	\$20,010	\$21,200
34	Search & Transitions	\$15,000	\$3,969	\$15,000
35	Denominational Affairs	\$31,738	\$31,488	\$33,878
36	Program and Committee expenses	\$11,390	\$7,428	\$10,400
37	Social Action Committee and Share the Plate Grants	\$40,600	\$40,600	\$43,200
38	<b>TOTAL EXPENSES</b>	<b>\$828,774</b>	<b>\$824,314</b>	<b>\$878,739</b>
39	<b>NET OPERATING INCOME (LOSS)</b>	<b>(\$15,806)</b>	<b>(\$26,673)</b>	<b>(\$7,500)</b>
40				
41	<b>OTHER INCOME</b>			
42	From Undesignated Operational Reserve	\$15,806	\$16,673	\$0
43	From Stabilization (Snow, Utilities, etc.)		\$10,000	
44	From Sabbatical Escrow			\$7,500
45	<b>TOTAL OTHER INCOME</b>	<b>\$15,806</b>	<b>\$26,673</b>	<b>\$7,500</b>
46	<b>ADJUSTED OPERATING INCOME (LOSS)</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
47				
48	<b>Estimated Year End Reserves Balance</b>	<b>\$59,719</b>	<b>\$48,852</b>	<b>\$41,352</b>

# Financial Review for the 2024 – 2025 Fiscal Year

Conducted by Kathy Richardson and Chris Weigand

It should be noted that additional details were provided to the Standing Committee and the treasurer. The purpose of this report is to broadly report on the church's financial management, without highlighting the details of less significant areas to be watched or improved.

## 1. General Comments

- a. Overall, the books appeared to be well managed and to accurately reflect the financial position of the church. Missing check numbers (from the bank statements) were reviewed. The missing checks were all shown in QuickBooks as voided.
- b. There are areas of expenses, such as Livestream Coordinators, Flowers, Snow Removal, and Copying and Printing where the costs are relatively high. Ongoing reviews of our costs is a good idea – there are some opportunities for saving. When Stacey was hired, she cancelled some subscriptions which weren't being used.
- c. There is room for improvement in managing the overall budget. There are monies in the general fund from the Covid timeframe which are being depleted. We need to take a hard look at what we need to do to maintain balanced budgets. This includes adding funds into reserves for unexpected major repairs and years with very high snowfall.

## 2. Policies and Procedures

The Society's by-laws and policies related to governance, personnel, finance and safety can be linked from the Members & Friends page or from the Weddings, Memorials & Rentals page of the website. In addition to these, we recommend that it adopt policies concerning

- a. Cyber security & data privacy: Clear procedures are needed to safeguard sensitive personal and financial information of the society, its staff and congregation.
- b. Records retention: The document Winchester Unitarian Society – Description of Funds summarizes the intent and restrictions on the society's many special funds and is regularly updated. However, in most cases the original documents establishing the restrictions are not available. Other documents may also need to be kept for various lengths of time for legal purposes. A schedule should be determined and added to the society's policies.
- c. Use of church credit cards: A draft policy from 2010 was apparently in use for a brief time, but we could find no documentation that it was formally adopted or that it has been given to staff hired since then.
- d. Transitions: A document listing the responsibilities of key financial personnel (treasurer, assistant treasurer, trustees, bookkeeper and church administrator) along with the designated back-up person for each task is recommended. From that, instructions for key processes could be developed to help with transitions.
- e. Reimbursements: The reimbursement form calls out "Signature of Committee Chair or Person Authorizing the Purchase". We should have a policy that includes an approval matrix and the provision that a person should never be able to approve their own reimbursements.

## 3. Payroll

In order to assure that time worked and paid time off align with the terms of letters of agreement, we need to

- a. Make sure that the personnel folders for all staff include letters of agreement along with amendments.
  - b. Have supervisors sign off on time cards, verifying that hours worked align with letters of agreement.
  - c. Monitor compliance with reporting of time off taken.
4. Software and memberships
- a. Microsoft Office: We have one family license, plus additional licenses for some staff members which were reimbursed. The least expensive option for Microsoft software is to get licenses for non-profits.
  - b. QuickBooks online has a discount, which could save money over time, but it would require a transition and dual books for a short time.
5. Cash management and maximizing returns on our current funds
- a. There are areas where a larger percentage of our funds could be kept in interest-bearing accounts.
  - b. We need to verify that the amount of funds at our primary bank doesn't exceed the FDIC limits for coverage.
6. RE Funds
- a. There is room for improvement in terms of which accounts are used to reimburse RE expenditures, so that the reporting actually reflects the usage.
7. Checks that were lost or not cashed
- a. Some of these were replaced almost a year after they were originally written. We may want to look at how stale checks are handled and tracked.
8. Insurance and/or bonding for those who handle money
- a. Our insurance contract includes coverage for the officers and those who handle money, but it is written in a way that is very hard to understand. The UUA is investigating the possibility of a group insurance plan, and the church will consider that if it becomes available.

# COMMITTEE REPORTS



# Annual Report 5/17/2026

## Standing Committee

sc@winchesteruu.org

**Members:** Gordy McIntosh (Chair), Kim Foley (Vice Chair), Judy Murray (Treasurer), Ginger Hanson (Clerk), John Keller, Chuck Khuen, Ryan Levering, Sheila Puffer, Liz Scott, Marcy Tompson, Matt Wilson

**Meetings Schedule:** 1st Wednesday of the month (Board only); 2nd Wednesday of the month

## Accomplishments This Year

At our Fall Retreat, we established our goals for 2025–2026 and made progress on all of them.

- We supported the Minister Search Committee and their process
- We supported the Transition Committee as they guided the congregation in creating a covenant
- We helped establish the Membership Task Force
- We reflected on how we want to function as a Standing Committee. We created our own covenant as well as guidelines for our Executive Committee. [Executive Committee](#)
- Given all the challenges that are going on in the world we contemplated our committee's place in our congregation  
[The Role of the Winchester Unitarian Society and Its Members in Advancing Social Justi...](#)

## Goals for Next Year

With the exception of the congregational covenant, all of our goals will carry into next year. The progress we've made this year will help shape our priorities for 2026–2027. In addition to the Minister Search and Membership Task Force, we may also take on a review of our bylaws and our approach to fundraising.

## Buildings and Grounds

building@winchesteruu.org

**Chair(s):** James Pidacks and Matthew Bronski

**Members:** James Pidacks (Chair), Matthew Bronski (Co-Chair), Chuck Khuen, Joe Eiler, Steve Forcucci, Mike Lambert, Julie Khuen, Margaret Lowry, and Stacey Katz (Church Administrator)

**Meetings Schedule:** 1st Wednesday of the month

First, a big and well-earned thank you to all the members of the B&G committee, the sextons, the church administrator, and everyone else who has helped maintain and improve our church building and grounds. This year, we saw our church administrator, Richard Dorbin, retire. Stacey Katz joined us as the new administrator. Our longtime morning sexton, Joe Correcelli, also retired. After evaluating our needs, we hired All Pro Cleaners, who come on Monday and Thursday evenings, as our cleaning service. Mike Bussell continues as our weekday afternoon sexton and Mike Donegan as our Sunday sexton.

### Accomplishments

Our first priority is maintaining a safe environment. We ensure all required inspections are completed on time and that any deficiencies are addressed. This includes: fire alarms, fire sprinklers, fire extinguishers, kitchen fire suppression, kitchen hood cleaning, elevator (the big money item), emergency lighting, exits, and exit signs. We also conduct an annual fire drill. In conjunction with the Safety and Security Task Force, we provide training to staff and volunteers.

Next on our list of priorities is saving energy and reducing our carbon footprint. This past year, we installed a high-efficiency closed-combustion hot water heater, replacing a unit with a failing pilot light and an out-of-code exhaust flue.

We now have online account access to National Grid for our natural gas, Eversource for electricity, and Enphase Energy for solar output. These connections will help us better monitor our usage and costs. I am pleased to report that as of April 27, 2020, our solar panels have produced 14.66 MWh (Mega Watt Hours) since being installed. We are now seeing the effect on our electric bills. A review of our gas bill showed we were being charged tax, which was resolved, and we received a refund. Through Stacey's efforts, we found a vendor to remove the remaining old solar panel ballast blocks from the lawn at a reasonable price.

Each year, we work with a vendor to review the function of the over 300 steam traps that make up our heating system. These small mechanical devices are critical to the functioning and efficiency of our steam system. Like any mechanical device, they age out and need repair or replacement. We receive a full rebate for the cost of this service.

Our church building is over 20,000 square feet, and under Massachusetts law, M.G.L. 25A S20, we are now required to report our energy usage under the Large Building Energy Reporting Program (LBER). We are in the process of setting this up with the state and our vendors.

A B&G team effort filled a dumpster as part of preparing for our first haunted house. Our afternoon sexton, Mike Bussell, was a major contributor to the effort. We have also been giving away our tired and unused metal folding chairs. This is part of a larger effort to remove unused, broken, or unwanted items from our ten different storage areas/closets. Please think before your stash and thank you, but we don't really need another used microwave.

In December, BGC (Julie and Margret) was responsible for "decking the halls" of the Sanctuary and exterior doors with wreaths, bows, roping and wreaths, both fresh and artificial. This year, we added 15 multiple-sized wired birch trees for more sparkling holiday light to the altar area, which brought rave reviews. Many thanks to Sue Kiewra for getting these trees for crafting kindness.

Mike Lambert has been the lead on upgrades to Wi-Fi infrastructure including replacing a Wi-Fi access point, network switch, network monitoring software, and, soon, new cameras and doorbells. We are also in conversation with the nursery school about expanding the security cameras financed through a donation from one of the school parents. This will expand coverage for the school and allow both WUS and the school to access all cameras.

Special thanks to Steve Forcucci for building and installing under-pew shelves for hymnal storage on front pews.

Enough about the inside of the building. Our committee is Building and Grounds, Julie Khuen and Margret Lowery drive the Grounds part of our mission. This has included our spring and fall clean up jointly with our Green Sanctuary Committee and dedicated volunteers throughout the growing season, to help weed and dead head spent flowers in the garden beds. The Meditation Garden, Main St entry, Mystic Valley Parkway gardens and Pollinator Gardens all continue to mostly thrive with a succession of bloom, color and texture from early spring through to late fall, drawing glowing comments from the congregation and appreciative Winchester residents. Margaret Lowry continues to add her garden enthusiasm to the area around the Nursery School, working, weeding, and planting in all types of weather.

Other items included working with the haunted house team on lighting, power usage, and safety. We provided outdoor lighting for the Christmas Advent circle created by RE. We managed repairs to the Symmes kitchenette dishwasher which has been going strong every Sunday for over 20 years. Special thanks to Patrick Draine for installing new casters on the upright piano used by the youth choir. Thanks also to everyone who helped move, lift, and tip this exceptionally heavy instrument. This will save wear and tear on the floors.

There have been many other repairs, both large and small, broken windows fixed, door closers adjusted, squeaky doors oiled, light bulbs replaced, lighting timers adjusted, batteries replaced, and all sorts of unwanted items recycled and removed.

## **Plans and Challenges**

The church, as the nursery school's landlord, is required to provide a rodent management program. When our previous vendor failed to provide reasonable and adequate service, we hired a new vendor. The vendor was selected based on recommendations of other UU churches and does not

use anti-coagulant bait traps. Unfortunately, these efforts have not fully met our expectations, and we are in regular contact with the vendor. B&G has patched or filled any obvious holes or cracks we could find to prevent mice from getting in. However, the mice seem to be winning. We ask everyone to please store food properly and to carefully clean up after any event where food has been served. Please make every effort to stop feeding them. Thank you in advance.

Building usage, temperature, and the heating schedule will be reviewed to determine whether we can reduce the total heating hours per season. Due to limited capacity and funds to modify the physical building, adjusting how and when the building is used remains the best option. Consolidation of meetings to certain days may be considered to limit heating an entire wing for a single meeting. A surcharge for renters during the heating season and adjustments to temperature set points may also be advisable. Considerations for worship services, concerts, and memorial services will be taken into account. This planning is ongoing; more detailed data and analysis are required.

Snow removal costs have risen dramatically. Per requirements by the Town of Winchester, we expanded removal to include sidewalks on Mystic Valley and Main Street in front of the building. Finding a place to put the increasing loads of snow led to some damage to the plants, pathways and stone. BGC plans to mark the edges of the garden beds more visibly for next year. We plan to send a quote request to multiple vendors. If you have experience in this area and would like to help, please contact the office. We will arrange a meeting.

The UUA has engaged an insurance broker to create a larger insurance pool and hopefully get interested congregations better rates than going to Church Mutual one at a time. We have submitted our information to the broker and are waiting for a quote. We will take the quote to the Standing Committee when it arrives. If you have insurance experience as an agent or broker and can help, we would love to hear from you.

Respectfully submitted by the Building and Grounds Committee: James Pidacks (Chair), Matthew Bronski (Co-Chair), Chuck Khuen, Joe Eiler, Steve Forcucci, Mike Lambert, Julie Khuen, Margaret Lowry, and Stacey Katz (Church Administrator).

## Employee Relations

erc@winchesteruu.org

**Chair(s):** Lee Barton

**Members:** Lee Barton, Zareen Karani Araoz, Marilyn Mullane

**Members Continuing:** Zareen Karani Araoz, Marilyn Mullane

The Employee Relations Committee (ERC) is a WUS By-Law committee created in 2013. Over the past year we offered employees (except soloists in the choir) an opportunity to discuss any current workplace issues, concerns or positive developments. We met with some employees; others passed on the offer. In some cases there were brief follow-up conversations. Each employee was reminded in writing and in person that anyone on the WUS staff is welcome to contact ERC at any time throughout the year if there are pressing workplace issues they would like to discuss. ERC interactions with staff are confidential, and discussed outside the ERC only with the agreement of the employee.

In past years the ERC has been brought in to help investigate and resolve disputes. This church year, happily, there were no disputes requiring ERC involvement.

Following a suggestion of interim minister Seth Carrier-Ladd we have been benchmarking with other U-U congregations, inquiring about their governance structure, asking whether they have had personnel issues or staff conflicts, how they resolved them, and what were the short-term and long-term effects. When our interviews are complete, we will forward a report to the interim minister and the Standing Committee.

We published in Highlights an appreciation of Jenny Goh celebrating her 10<sup>th</sup> year as the society's bookkeeper. We hope in future to acknowledge other valued employees as well.

Respectfully submitted,

Lee Barton, Zareen Karani Araoz, Marilyn Mullane

## Fellowship

fellowship@winchesteruu.org

**Chair(s):** Mike Lambert

**Members:** Mike Lambert, Donna Reed, Janet Nelson, Lindy Brown, Deb Eiler, Naomi Magnoni

**Members Continuing:** All except Lindy Brown

**Meetings Schedule:** Monthly on Third Thursday at 5:30pm (except June and July)

### Major Accomplishments This Year

- Hosted “Welcome Back Potluck” lunch (September, 100 people)
- Hosted “Pie Sunday” (November, 80 people)
- Co-Hosted with RE “Drop & Shop” childcare (December, 12 kids)
- Hosted “Holiday Potluck” lunch (December, 80 people)
- Co-Hosted with RE “Early Valentine’s Date Night” childcare (February, 18 kids)
- Co-Hosted with RE “Pastapalooza” supper (April, 60 people)
- Janet hosted three Book Club meetings (10-12 people)
  - *Here Comes the Sun: A Last Chance for the Climate and a Fresh Chance for Civilization* by Bill McKibben
  - *James: A Novel* by Percival Everett
  - *Giving Up is Unforgivable: A Manual for Keeping a Democracy* by Joyce Vance
- Recruited “Coffee Hour” refreshment volunteers throughout the church year
- Future: Host “Closing Potluck” lunch (June)

### Goals for Next Year

- Seek new ways to encourage fellowship beyond our established methods
- ServSafe food handling training (two people)
- Continue to promote committee shared document collaboration (Google Drive)
- Create and manage a “Friends of Fellowship” group to assist at committee events

The Fellowship Committee has enjoyed providing these fellowship opportunities during the past year, and are looking forward to next year. Many thanks to Sam and Brenna of RE for collaborating with us, and to the WUS SC for the encouragement and support.

## Green Sanctuary

green@winchesteruu.org

**Chair(s):** Lindy Brown & Phil Coonley

**Members:** Fritzie Nace, Sheila Puffer, Brad Steele, Sue Doubler

The WUS mission statement says, *“The Winchester Unitarian Society is a welcoming, caring, community, devoted to spiritual growth, social transformation and environmental responsibility. Guided by the Unitarian Universalist principles and drawing on diverse faith traditions, we live our values to worship reflection, connection and service.”* Having “Environmental Responsibility as one of our three main mission objectives distinguishes us from most faith communities including those of many other UU' churches that share our [7th Principle](#): *Respect for the interdependent web of all existence of which we are a part.* Good husbandry of our Earth is important because it allows human and other life to thrive. Acting to protect other forms of life on Earth and their nonliving ecosystems by minimizing our pollution and maintaining diverse habitat slows the extinction of Earth's life forms whose survival is intertwined with humans' in ways not fully understood.

GS's most active members this year were Fritzie Nace, Sheila Puffer, Brad Steele, Sue Doubler, and Co-Chairs Lindy Brown and Phil Coonley. Woody Woody and Naomi Magnoni were key in planning the two WUS canoe trips: RE's trip, and the adult & teenager trip GS will lead. Dave Fonseca, Roofus Hoffmann, and Alan Field are among the regular repairers at the town's Repair Cafes'. And our member meteorologist, John Keller, patiently explained to us the counter-intuitive reasons why the warming Earth caused New England to have its most snow and cold in many a winter.

While the GS Committee focuses on the WUS mission goal of environmental responsibility, ***in 2025-26 several other committees were especially impactful:***

- **The Building and Grounds and Standing Committees'** installation of the newest solar array whose annual output will now exceed all current electricity use.



<https://russganz.smugmug.com/AerialPhotos/2026/Church/i-KcW5mJc/A>.

GS has had drone photos taken of the array and is lobbying for an all church celebration this spring.

- **The Fellowship Committee** chose, as a church read, the book *Here Comes the Sun: A Last Chance for the Climate and a Fresh Chance for Civilization*, by Bill McKibben. GS had already asked the author (leader of the climate campaign groups [350.org](http://350.org) and the Third Act) to speak at the church, and chosen a solar array focused documentary "The Light Will Not Dim" he helps narrate -as a candidate for a "watch party." Fellowship agreed to combine their book discussion with the film showing. (see #2)
- **The Social Action and Outreach (SAOC)** collaborated on:
  - The well attended **NO Kings** rallies held on our church lawn on Oct. 18, 2025 and March 28, 2026 as each have overlapping interest in US democracy's essential role in reversing climate-hostile national US policy, and also in fixing US immigration policy given that it is in large part fueled by global warming
  - Providing substantial share-the -plate and grants money to GreenRoots
  - Co-signing with us a Faith Resolution letter to Gov. Healey respectfully urging her to take all possible actions to prevent the proposed private jet hangar expansion at Hanscom Field airport. ( <https://www.stopprivatejetexpansion.org/faith> )

2025-26 goals and progress are summarized below:

1. **Building connections with one or more environmental justice communities**, GreenRoots in Chelsea and East Boston empowers campaigns and projects to achieve environmental justice, improve public health, and prepare for climate change issues ranging from flood resiliency, waterfront access, and implementing green infrastructure. Barbara Espinosa Barrera, Environmental Justice and Health Equity Organizer at Green Roots spoke at our January 26 worship service last year and met with the congregation afterwards. This summer, Green Sanctuary asked for volunteers to serve food at its 30th anniversary celebration. Two of us did and were impressed by the friendliness and joy from the diverse folks gathered. This April, Ms Barrera called with an urgent request for lobbying of Jason Lewis - State Senator for most residents in Winchester- to get air quality bills added to the environmental bond bill. His vote was one of four still needed. GS contacted its own members as well as those of SAOC and other social justice and environmental folks in town to call Sen. Lewis. His vote was secured.
2. **Watch parties to grow environmental awareness.** On June 28, we hosted a group hike on the Tri-Community Trail along the Mystic Lakes, and a concert with snacks in our chapel. Mandeville & Raianne Richards performed. This was part of the 14th Annual Massachusetts Walking Tour to raise awareness of local recreational green space throughout MA. The GS's only other watch party this church year, on Jan. 11, was of the 30-minute documentary "the Light will Not Dim". This solar power focused event, in collaboration with Fellowship's discussion of the related McKibben book (above), filled the Parlor with enthusiastic discussion.
3. **Our exploration of Climate Fresk** interactive climate simulation game by participation in two 2-hour, 4-person sessions was found stimulating but not particularly strong on simulating action "solutions".

4. **WinPower promotion.** Our promotional activity was less as most congregants have now adopted their locally recommended source of 100% "renewables" electricity.
5. **Helping congregants share information about own "green" household/home actions -** Relied only informal on communications this year as many of us continue to be well known as having experience with most climate friendly technologies, and happy to share.
6. **Encouraging a network of pollinator gardens.** Our effort here was focused on using the weekly WUS Highlights to make congregants aware of webinars on pollinators (and invasives) and on opportunities to secure pollinating plants for their own yard or window boxes.
7. **Collaborating with local green church groups and other local environmental organizations.** We continue to collaborate with the First Congregational Church on the now quarterly **Repair Cafes**. (Four of those making repairs are from WUS.) Several GS members are active members of the MetroNorth Node of Mass 350, Sustainable Winchester, and UU Mass Action, and UU Climate Justice Collaborative. This keeps us abreast of local and state environmental policy and influence opportunities. As recommended by the latter two UU groups, we officially joined the Stop Private Jet Expansion (SPJE) coalition. On Oct. 12 the WUS letter was delivered to the Governor's State House Office by Sue Doubler as part of the SPJE Coalition.
8. **Organizing volunteer clean-ups of our church yards.** To minimize release of CO<sub>2</sub>, other air pollution, and budget costs related to contracting for grounds maintenance: and to set a good example given our high-visibility location in town center, the BG&C Committees collaborated with GS in organizing volunteer fall and spring clean ups using only hand or electric only yard tools.
9. **Leading Canoe trips for youth and adults on the Aberjona River, through Mystic lakes, and down Mystic River.**
  - a. RE families: May 9th (rain date June 13th) to Medford shell and includes beverages and lunch.
  - b. Adults and teenagers: June 13th (unless RE trip on May 9th was rained out) or June 20; all the way through the Amelia Earhart Locke and bring your own fluids and lunch.
10. **Minimizing rodenticide:** Our Administrator, Stacey Katz has continued Richard Dorbin's phase out of anti-coagulant rodenticides on WUS property. For these kill not just mice and rats, but also the mammals and birds that feed upon them.

**Outlook for 2026-27:** We are exploring the new UU official Green Sanctuary 2030 accrediting process and expect this will influence our environmental responsibility priorities for 2026-27 church year. <https://www.uua.org/environment/green-sanctuary>

INTERESTED? JOIN US. ALL ARE WELCOMED.

## Membership

membership@winchesteruu.org

**Chair:** Patty Cameron

**Members:** Laurie Russell, Ramsey Railsback, Gloria Legvold, Sarah Phillips, Sue Doubler

**Members Continuing:** Laurie Russell, Ramsey Railsback, Gloria Legvold, Sarah Phillips, Sue Doubler

**Meetings Schedule:** Currently, 3<sup>rd</sup> Thursday each month at 7:00PM

### Major Accomplishments This Year

- 84 people participated in Circle Dinners this year
- Scheduled ushers and greeters for the church year, engaging committees to serve
- Hosted a Newcomer Brunch and a 3-part Path to Membership class
- Five new members joined this year
- Joined the Chamber of Commerce to assist with outreach efforts
- Assisted the Membership Task Force with data, trends, thoughts on membership

### Goals for Next Year

- Starting earlier to engage committees to serve as ushers and greeters
- Bring back and staff the Visitor Table every Sunday at Coffee Hour
- Work with whomever is doing Communications and Outreach to bring in people from Winchester and surrounding towns

## Ministerial Search

search@winchesteruu.org

**Chair(s):** Terrill Levering and Dan Spencer

**Members:** Sue Kiewra, Alison Kirchgasser, Martin Newhouse, Mayra Rodriguez-Howard, Sophia Sid

**Members Continuing:** all

**Meetings Schedule:** varied

With the support of the UUA, Rev Seth and the Standing Committee, the Search Committee followed a very thorough, intentional process developed by the UUA to search for our next settled minister. Ultimately, we did not find a match this cycle, but the committee has agreed to remain intact and continue our search in the upcoming year.

We are very grateful for the congregation's participation and support during this process. They were very responsive and active participants in our efforts, including completing the surveys, attending focus groups and other ways in which we asked for their input and participation.

We are also thankful to the Standing Committee for always being supportive of our efforts and responsive to our requests.

Thank you also to Rev. Seth for his guidance and support and to Stacey for her office support.

### **Timeline and summary of activities:**

**May 2025:** The Search Committee was nominated and approved at the Annual Meeting.

**June 2025:** The Search Committee participated in a UUA Transitions Team meeting where they shared an overview of the search process and what to expect.

**August 2025:** We held a day-long retreat, led by a UUA facilitator, where we developed a covenant and did team building activities, assigned roles and responsibilities for the search process and explored documents and deadlines.

**September-November 2025:** Congregational Survey: A UUA-designed Congregational Assessment was administered over several weeks both by Survey Monkey and in paper form. We are grateful for the high participation rate from our members to inform us of their opinions and hopes for Winchester Unitarian Society and its future minister.

"Break Barriers, Build Beliefs" (B4) online congregational survey to inform the B4 workshop. The Search Committee, members of the Standing Committee and several members and friends attended the UUA facilitated virtual B4 workshop, which was designed to identify and counter systemic and personal biases in the search process.

Focus groups: Focus groups were held during committee meetings and via Zoom to identify members' hopes and needs for the new ministry and to better inform our search. Twenty-two focus groups were held with over 80 congregants participating.

A new video introducing the church was produced by Don Daniel, and included in our packet for potential ministers. It is also featured on our website. We're very grateful to Don for the many hours he spent on this effort, as well as Liz Lintz who helped create messaging, and to the many congregational members and staff who so graciously volunteered their time in this effort.

Salary/compensation negotiating team selected: Committee member Martin Newhouse, Judy Murray and Kathy Richarson were selected and approved as the Negotiating team by the Standing Committee.

**December 2025:** We used all the information we had gathered to develop our Congregational record. This record, which is uploaded to the UUA Ministerial search portal, represents the congregation and what we are looking for in a minister.

**January, 2026:** Applications arrived in the search portal. The Committee reviewed the materials submitted by candidates and conducted video interviews. After reviewing applications, checking references and conducting preliminary interviews, the committee invited pre-candidates to visit Winchester for more formal interviews.

**March 2026:** We conducted pre-candidating weekends in early March, spending the full weekend with pre-candidates, including lovely dinners at Sue's house (thank you Sue!) more formal interviews, tours of the church and a small Vespers style service led by the pre-candidates.

We submitted a ranked choice of candidates to the UUA. All decisions made were unanimous among the members of our committee.

The UUA informed us that unfortunately we did not have a match.

We are very grateful to Rev. Seth who has agreed to continue his ministry with us for another year! Thank you!

After consulting with the UUA Transitions Director, the Standing Committee and Reverend Seth on next steps, all committee members have agreed to stay on and continue with our search in the next year. The committee is very satisfied with the process we followed.

Finally, we thank you, our congregation, for entrusting us with this work and for your faithful participation throughout this search. We look forward to our continued partnership and to finding a successful match in the coming year.

## Nomination & Leadership

nominating@winchesteruu.org

**Chair:** Sheila Rudolph-Correia

**Members:** Naomi DeLairre, Vicky Coccoluto, Barbara Savage , SC Liaison Gordy McIntosh

In addition to recommending a slate of WUS officers, representatives, trustees and By-law Committees to be voted on by Society members at the Annual Meeting, the Nominating Committee is also responsible for programs to enhance the proficiency of the Society's lay leadership. While small in number (4 members-at-large plus Standing Committee liaison), we:

- Hosted the October 9, 2025 Committee Chair in-person meeting asking each Committee to bring a collaborative event or program that would engage our congregation, attract visitors or accomplish both. All offered at least one event and many were able to collaborate with another Committee. Committee Chairs were also asked to send their Co-Chair or someone they were grooming for leadership. Like last year, Nominating reviewed a sample Committee Transition Worksheet and sample minutes (including when they are due to the Standing Committee) and gave a brief overview of administrative tasks, such as reserving a meeting room and requesting reimbursement.
- For the fourth year, hosted a well-attended and fun Committee Fair, also known as Sundae Sunday, on February 1, 2026 with both by-law and non-by-law Committees. As in previous years, folks had to earn sundae toppings by engaging with committee representatives. There were a lot of great conversations but only one sign-up; a few names were tagged for further contact about joining a committee.
- NLDC is currently working to complete its slate for church year 2026 – 2027, to be presented and voted upon at the upcoming May 17<sup>th</sup> Annual Meeting. This year has been particularly challenging to complete given seven of our engaged members are still needed for the Search Committee, leaving extra vacancies to fill.
- The NLDC is extremely grateful to all members, those newly joined and those longer-serving congregants, who stepped up and will serve on Committees for the 2026-2027 church year.

Respectfully submitted,

Naomi DeLairre, Vicky Coccoluto, Barbara Savage , SC Liaison Gordy McIntosh and Chair Sheila Rudolph-Correia

## Slate of Officers, Representatives, & Committee Members

Term ending  
in 2027

Term ending  
in 2028

Term ending  
in 2029

<b>Standing Committee</b> (9 elected members, 3 annually for 3-year terms)		
Gordon McIntosh	Matt Wilson	Ryan Levering
Marcy Tompson	Kim Foley	Becky McVey
John Keller	Liz Scott	Lee Barton

<b>Clerk</b> (annual term)		
Ginger Hanson		

<b>Treasurer</b> (annual term)		
Chris Weigand/Judy Murray		

<b>Assistant Treasurer</b> (annual term)		
Jeanne Johnson		

<b>Moderator</b> (annual term)		
Martin Newhouse		

<b>Denominational Affairs Representative</b>		
Patty Cameron		

<b>Trustees of Permanent Funds</b> (3 elected members, 1 annually for 3-year term)		
Peter Baldwin	Rebecca Keller	Denise Pappas

<b>Employee Relations</b> (3 elected members, 1 annually for 3-year terms)		
Zareen Aroz	Marilyn Mullane	Naomi DeLairre

<b>Fellowship</b> (6 elected members, 2 annually for 3-year terms)		
Deb Eiler	Donna Reed	Rebecca Feldman
Mike Lambert	Naomi Magnoni	Janet Nelson

<b>Membership</b> (6 elected members, 2 annually for 3-year terms)		
Ramsey Railsback	Sue Doubler	Sarah Phillips
Laurie Russell	Gloria Legvold	Jean McClurken

<b>Music</b> (6 elected, 3 annually for 3-year terms)		
Kathryn Maffei	TBD	Joi Loewy
Carolyn Schatz	Sarah Milt	Fei Wang

<b>Nominating Leadership Development</b> (4 elected members, 2 annually for 2-year terms)		
Barbara Savage	Sheila Rudolph-Correia	
Vicky Coccoluto	Sara Delano	

<b>Religious Education</b> (6 elected, 2 annually for 3-year terms)		
Lisa Spencer	John Grebe	Ellie Griffin
Sarah Darrieulat	Deb Walsh	TBD

<b>Social Action and Outreach Committee</b> (7 elected members for 3-year terms)		
Liz Black-Suchy	Fritzie Nace	Patrick Draine
Brett Mulder	Susan Woodward	Phil Coonley
	Nancy Scott	

<b>Youth Advisory</b> (6 elected, 2 annually for 3 year terms)		
Erin Graham	Victoria Ippolito	Sally DeGan
Devon McClurken	Michelle Crawford	Joi Loewy

## Pastoral Care Associates

pca@winchesteruu.org

**Members:** Lee Barton, Karen Caputo, Vicky Coccoluto, Terry Currier, Kim Foley, Sheila Rudolph-Correia, and Marilyn Wilson

**Meeting Schedule:** Third Thursday of each month

The Pastoral Care Ministries are 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.

### A few Highlights from the past year, through April, 2026:

- The activities of the **Pastoral Care Associates (PCAs)** are under the direction of the Senior Minister, currently fulfilled by our Interim Minister, the Rev. Seth Carrier-Ladd.

Returning PCAs this year are Lee Barton, Karen Caputo, Vicky Coccoluto, Terry Currier, Kim Foley, Sheila Rudolph-Correia, and Marilyn Wilson. Donna Reed continues to be a valuable resource for the PCAs, but is presently on a temporary leave of absence from the group to attend to family matters.

The PCAs provide connection via phone calls, notes, or, when possible, visits to those in our congregation who are ill, unable to attend church regularly, or simply appreciate a visit. Each Sunday in the program year (mid-September to mid-June) the PCAs see that chancel flowers are delivered to recipients, over 30 deliveries in all, through the last Sunday of April, 2026.

- **Pastoral Care Resources (PCRs)** have served previously as PCAs and are available to participate as needed in the various Pastoral Care Ministries. Our PCRs are Sara Delano, Karen Erikson, Barbara Keyes, Carole Nassif, Maggie Russell, and Maria Shepherd. PCRs provide additional support for the work of the PCAs, as well as leadership for the Memorial Team.
- **Meals and Rides** (previously Caring Network) volunteers are coordinated by Gay Mohrbacher, who receives requests for support from the PCAs or directly from the Minister. Volunteers provide practical assistance, such as meals, rides, and errands, which can be short-term, or extended in times of lengthy or serious need. In this past church year, a total of **14 meals** were delivered to **4** separate members; **2 local errands** were run; and **1 member was driven** to and from a medical appointment. In late March the boiler room freezer was cleaned of meals that were too old to be shared. We may repeat the call for meals to be frozen either in the fall or spring of the coming church year. Another goal next year is to refresh our volunteer list.

- The **Family & Caregiver Support Group** disbanded about a year ago due to dwindling numbers. The weekly conversations had been co-facilitated by long-time leaders Isobel Magee and Maria Shepherd, joined in the final year by Jamie Berg, with Maury Wood facilitator Emeritus. The group met for 8 years and leaders felt it was quite worthwhile. At this time they recommend that members in need of mental health services either for themselves or family members contact the National Alliance on Mental Illness (NAMI), online at Nami.Com.
- **Memorial Service & Reception Team**, led by Sara Delano, Karen Erikson, Vicky Coccoluto, and joined this year by Barbara Savage, works closely with the PCAs and the Senior Minister to provide support and practical guidance for families holding memorial services and receptions at the church. Team Leaders are supported by a roster of 35 volunteers from the WUS congregation—a group that is refreshed periodically, and is open to new joiners at any time (please reach out to any Team Leader). The Memorial Team assisted with a September service for Robert Kenerson, officiated by Rev. Seth. A December service for Carol Ann Clem Cronon benefited from the coordination of former WUS member Toni Wegner (now residing in Texas) with Team Leaders; the service was officiated by former WUS Intern Minister Marianne DiBlasi, in collaboration with Rev. Seth. In January the PCAs organized an informal gathering in the Parlor where friends remembered Warren Orr with stories and poetry, and joined in singing his favorite hymn, led by John Kramer and Liz Lintz. In March, Rev. Seth officiated at the memorial service for Brenda Wells-Crowley, supported by a large number of Memorial Team volunteers.

Our thanks to the technical team which makes it possible to livestream, record, and archive memorial services. This capability has added a greatly appreciated dimension to services and comfort provided to the families involved and to our community.

Submitted by Marilyn Wilson on behalf of the Pastoral Care Ministries

## Personnel

personnel@winchesteruu.org

**Chair:** Kathy Richardson

**Members:** Pete Baldwin, Sue Kiewra

**Members Continuing:** Members appointed by Standing Committee in the fall

### Major Accomplishments This Year

- In October the Standing Committee approved our recommended update to the Personnel Policy Manual, which was last revised in December 2022. Changes include new provisions for extended medical leave, severance pay and workplace threats. Additionally, there are updates to and clarifications of 26 previous provisions. A link to the manual is in the list of church policies on the Members & Friends page of the church website.
- At the request of the Standing Committee, we investigated opting into the Commonwealth's Paid Family and Medical Leave Act. Religious institutions are exempt from certain requirements, including the PFMLA, that apply to most other employers. We recommended that WUS waive the exemption and have worked with Stacey to complete the steps needed to provide our staff with this benefit.
- We worked with staff to improve the methodology for reporting paid time off taken and tracking time off accrued but unused.
- We advised the administrative staff as they worked to increase the security of employees' sensitive information and updated the checklist of tasks and paperwork for new hires.

### Goals for Next Year

- Continue to advise the Standing Committee on matters related to employee compensation, benefits, personnel policies, and employee contracts for all WUS employees except the ministers.
- Work with the administrative staff to develop processes necessary to implement best practices as an employer.

## Racial Justice Group

racialjustice@winchesteruu.org

**Chair(s):** None

**Members:** Robbie Brown, Harris Gibson, John Grebe, Jennifer Infantino, Nicole Kassissieh, Gloria Legvold, Claire McNeill, Patty Shepard, and Sandy Thompson

We decided early in the church year to continue with a second thoughtful conversation about Palestine. (On April 13, 2025 we offered "Let's Talk about Palestine," featuring former members of WUS, sharing their perspectives.) On November 9, 2025 after the worship service, we shared a clip of Peter Beinart, author of "Being Jewish after the Destruction of Gaza," as he spoke about the complexities of discussing the war between Israel and Gaza. This year's well attended and meaningful exchange also brought us two wonderful new members to the Racial Justice Group.

With Jennifer Infantino's leadership we were able to co-sponsor an important event of the Network for Social Justice, that took place at WUS in early March, "Conversations, not Confrontations," facilitated by Jamele Adams.

Led largely by Nicole Kassissieh, we held another event in early spring, again well attended. We were delighted to have a very special guest speaker, Dr. Karen Abdool, for a conversation entitled: "Beyond the Headlines: Why Trauma Across Generations Shapes How We Understand Conflict." Her careful examination of how inherited histories of violence, displacement, and oppression drive emotional responses, behaviors, and perceptions, of other groups, helped to deepen our understanding of various paths to healing.

Working with Social Action and Outreach we raised funds for UU seminarians to travel in January on a learning and witness trip to Palestine, facilitated by [UUJME](#).

Gloria Legvold and Sandy Thompson have faithfully continued to provide regular "Building Beloved Community" announcements in Highlights for over five years now. All of the previous years of offerings are compiled in separate files, which can be found [online](#) and in hard copies, available to borrow from the Michelson Room Library.

We remain eager to speak with folks that may be interested in contributing to our work going forward. Anyone who is interested, please don't hesitate to be in touch with any of the current members of the RJG. Your experiences and observations are always welcome.

Sincerely,

*Robbie Brown, Harris Gibson, John Grebe, Jennifer Infantino, Nicole Kassissieh, Gloria Legvold, Claire McNeill, Patty Shepard, and Sandy Thompson*

(Current Members of the Racial Justice Group)

## Religious Education

rec@winchesteruu.org

**Chairs:** Sara Darrieulat, Lisa Spencer

**Members:** Deb Walsh, Becky McVey, Kim Foley (SC Liaison), John Grebe, and staff members Brenna Mayer and Sam Wilson

**Meetings:** Monthly

The Religious Education Committee (REC) continued its work this year to support children, youth, families, and the broader congregation through vibrant and engaging Religious Education programming grounded in Learning, Service, and Joyful Community. Committee members included Sara Darrieulat (Co-chair), Lisa Spencer (Co-Chair), Deb Walsh, Becky McVey, Kim Foley (SC Liaison), and John Grebe, alongside staff members Brenna Mayer and Sam Wilson. The REC met monthly throughout the church year to support programming, coordinate volunteers, strengthen intergenerational connections, and support the evolving needs of children’s ministry.

This year’s guiding goal remained:

“To help create a church in which every member, from youngest to eldest, shares in nurturing our spiritual growth through Learning, Service, and Joyful Community, so that the responsibility and the rewards of RE belong to all of us.”

### Highlights from the 2025–2026 Church Year

#### Growth and Participation

Religious Education attendance remained consistently strong throughout the year, with many Sundays exceeding attendance from the previous church year. Participation was especially high during collective activities, all-ages services, and intergenerational events.

Highlights included:

- Strong attendance at regular Sunday RE classes throughout the year
- Expansion and continuation of four class groupings: two Spirit Play classrooms, Neighboring Faiths, and Coming of Age (COA)
- Continued growth in family participation at collective activities and special events
- Increased community visibility through outreach, and collaboration with other committees

The committee also continued to strengthen systems for volunteer coordination, event planning, communication, and childcare support.

## Religious Education Programming

### Spirit Play

Spirit Play programming continued to provide meaningful faith development experiences for younger children through storytelling, wonder questions, creative response activities, and community building.

Throughout the year, Spirit Play classes explored stories and traditions from many cultures and faiths, including:

- Judeo-Christian traditions
- Hinduism
- Buddhism
- Native American and Indigenous traditions
- African, Caribbean, Iranian, Scandinavian, and Mexican cultural traditions
- UU values and sources

Collective activities throughout the year included Diwali celebrations, Holi activities, Solstice Spiral construction, Memorial Day wreath making, music-centered programming, and Easter celebrations.

### Neighboring Faiths

The Neighboring Faiths program for grades 5–6 continued its exploration of world religions and UU values.

This year's curriculum included:

- Hinduism
- Buddhism
- Earth-based traditions
- Interfaith learning opportunities

The class successfully completed a Hindu temple visit early in 2026. The committee also explored possibilities for future intergenerational worship visits and partnerships with the Racial Justice Team.

### Coming of Age (COA)

The Coming of Age class for middle school youth focused on identity, social justice, reflection, and credo development.

Highlights included:

- Monthly mentor sessions and parent potlucks
- Journaling and writing exercises
- Conversations around social justice, diversity, and systemic racism
- Creative self-portrait projects
- Youth participation in service and worship leadership
- Credo statement preparation and presentation

The COA program continued to benefit from strong mentor involvement and family participation.

## **Intergenerational Worship and Community Events**

The REC continued to collaborate with the Intergenerational Worship Working Group and other committees to create meaningful all-ages experiences.

Highlights included:

- Water Communion
- Animal Blessing Service
- Thanksgiving Service
- Paper Bag Pageant
- Christmas Eve Family Service
- Easter All-Ages Service and Egg Hunt
- Flower Communion
- Solstice Spiral

Many events intentionally created opportunities for children and adults to participate together in worship, service, and community-building.

Additional intergenerational and community-building events included (or will include by the end of the program year):

- RE Family Brunch
- Pasta Palooza
- Kids Night Out
- Canoe Trip and River Cleanup
- Family Camping discussions and planning
- Collective activity Sundays

## **Service and Social Action**

Service continued to be a central part of RE programming this year.

Projects and initiatives included:

- Guest at Your Table (GAYT)
- Soup Jar Project (planned by Deb Walsh, not the RE Committee, though we also consider it a very successful intergenerational service project)
- Mitten Tree
- Dwelling Place collaboration discussions
- No Kings sign-making event
- Memorial Day wreath making
- Canoe Trip environmental stewardship activities

The committee also explored new intergenerational service opportunities with the Social Action Committee and community partners.

## Parent and Family Support

The Parenting Book Group launched this year and provided opportunities for parents and caregivers to gather in reflection and conversation.

The REC also continued discussions regarding:

- Childcare coordination and policy improvements
- Communication systems for families
- Inclusive event planning
- Volunteer recruitment and training
- Safety and CORI procedures

The committee remained focused on creating a welcoming and supportive environment for children and families across congregational life.

## Volunteers and Staffing

The REC continues to depend on a large network of volunteers, teachers, mentors, childcare providers, and committee partners.

This year included:

- Ongoing recruitment and support for RE teachers and teen assistants
- Continued development of the Fruit Tree volunteer system
- Recruitment efforts for nursery and childcare staffing
- Expansion of communication and social media outreach support
- Continued collaboration between REC, YAC, Fellowship, Membership, Music, and Social Action committees

The committee remains deeply grateful to all volunteers who contributed their time, creativity, care, and leadership throughout the year.

## Looking Ahead

As the church prepares for another year of growth and transition, the Religious Education Committee looks forward to:

- Continuing to strengthen intergenerational community
- Expanding outreach to families and the broader community
- Supporting sustainable volunteer and childcare systems
- Deepening opportunities for service and spiritual exploration
- Building stronger partnerships across committees and ministries

The REC remains committed to creating a vibrant, welcoming, and justice-centered religious education program for children, youth, and families.

With gratitude,  
The Religious Education Committee

## Social Action and Outreach

saoc@winchesteruu.org

**Chairs:** Chris Weigand (Chair), Fritzie Nace (Vice Chair)

**Members:** Liz Black-Suchy, Philip Coonley, Brett Mulder, Nancy Scott, Matt Wilson (SC Liaison), and Susan Woodward

**Members Continuing:** Liz Black-Suchy, Philip Coonley, Brett Mulder, Fritzie Nace, Nancy Scott, and Susan Woodward

**Meetings Schedule:** Second Tuesday of each Month in the Parlor (September thru June)

### Major Accomplishments for the fiscal year, ending Aug 2025:

- Served full meals at The Dwelling Place
- Continued to bring food donations to the Food Pantry at the Council of Social Concern
- Had another successful Thanksgiving Baskets drive
- Co-sponsored the Soup Jar Project with Deb Walsh and the Religious Education Committee
- Offered support to Mary McIntosh for the holiday Mitten Tree donations to Woburn Boys and Girls Club families in need.
- Managed and proposed the organizations to be recipients of the Share-the-Plate collection at the offertory
- Reviewed grant proposals and awarded grants in accordance with our WUS policy
- Sponsored a very successful a blood drive
- Provided 50% of the funding (\$225) for Dr. Karen Abdool, who lectured on the broad ranging impacts of trauma on vulnerable communities
- Working on a proposal to increase tax fairness for lower income Massachusetts residents

### Goals for Next Year

- Continue to manage Share-the-Plate and Grants
- Continue with Dwelling Place, Food Donations, Thanksgiving Baskets, the Mitten Tree, Soup Jar Project, and Blood Drive
- Look at hosting guest speakers and becoming involved in time-appropriate social action projects

### Details of Major Accomplishments for the fiscal year, ending Aug 2025:

**The Dwelling Place:** We have served or will serve 6 meals at the Dwelling Place. The Dwelling Place is a soup kitchen which provides meals for approximately 50 guests on Monday, Wednesday, and Saturday nights at the United Methodist Church in Woburn. We are serving on the fourth Saturday of every second month (Sept 2025, Nov 2025, Jan 2026, March 2026, May 2026, and July 2026). While each meal varies, the following is an example of a typical meal: We supply rolls, a salad, a meat dish with a starch and vegetable, and dessert. We also bring fruit and nutrition bars for the guests to bring home.

We would like to mention that Deb Walsh and five families have brought bagels and cream cheese every Saturday to The Dwelling Place from a bagel shop in Winchester. **“The Bagel Project”** has been very well received by the guests.

**Food donations:** As in years past, SAOC facilitated weekly food donations to the Council of Social Concern. Margo Sudbury delivered the donations throughout the year. The committee decided to step up publicity for this effort and now includes a weekly notice in Highlights and has made announcements from the pulpit. In partnership with RE the congregation was asked to bring one or two items of non-perishable food on a specific Sunday where children collected items to be brought to the Council. There has been an increase in food donations this Spring

**Thanksgiving baskets:** We provided 87 Thanksgiving baskets consisting of food and gift cards (to purchase a turkey or another meat item) to the Council of Social Concern. Eighty-three of the baskets were contributed by members and friends of WUS, and four baskets were paid for by a share-the-plate collection.

**Soup Jar Project:** Under the leadership of Deb Walsh, we joined forces again for the second year with Essential Partners in an intergenerational project to make soup jars to be distributed to the Enka and Council of Social Concern’s food pantries. Once again, this was a fun and fulfilling experience for all! Approximately 300 jars were filled and brought to the pantries.

**Mitten tree:** Mary McIntosh has led this effort for many years. Mary joined us at a committee meeting to share how the committee could support her efforts again this year. She asked the Woburn Boys and Girls Club to recommend families for our congregation to purchase gifts (or gift cards) for. Once again, the congregation came through and the Mitten tree requests were fulfilled.

## **Social Action:**

**Expansion at Hanscom Field:** We made an effort to raise awareness of the environmental problems with the proposed expansion of Hanscom Field, noting the amount of unnecessary pollution that would be caused by increasing the number of private jets.

**Blood Drive:** We hosted a blood drive on March 31, 2026 in Metcalf Hall. We are planning to try to hold two blood drives a year going forward.

**Tax Fairness:** We are in the process of drawing up a proposal to update the tax laws in Massachusetts to better serve the needs of lower income residents, whose needs are not advocated for as well as those of wealthier taxpayers.

We would also like to thank Mary McIntosh and Deb Walsh for their leadership in the success of the Mitten Tree and Soup Jar efforts.

We are very grateful to Stacey Katz and Jenny Goh for their wonderful help in getting out our messages to Highlights and for tracking the funds for Share the Plate and other committee expenses.

We also want to thank the members of the congregation who volunteered with us serving meals at the Dwelling Place.

## Grant Recipients for the fiscal year ending Aug 2026:

The table below lists the Grant recipients for 2026.

Grant Recipient	2026 Grant	Share the Plate*	Church Year 2025-2026 Total	Notes
Anna's Fund	\$1,800.00		\$1,800.00	Provides financial assistance to purchase healthy produce
Bridge Over Troubled Water	\$1,000.00	\$1,416.00	\$2,416.00	\$12 million budget, Helps homeless youth and young adults with housing and life skills
Council of Social Concern	\$1,000.00	\$1,920.00	\$2,920.00	Current budget = \$3,140 Y25 grant used for pantry purchases; also has helping hands fund (rent, expenses) and backpack prgm w/Woburn schools
Green Roots	\$1,200.00		\$1,200.00	\$10 million budget; Chelsea/E Boston - community programs, EJ support, food support. Equalizing effort for disadvantaged residents. Low overhead costs.
House of Peace		<b>\$1,500.00</b>	\$1,500.00	\$1534 through Share the Plate in 2025; in Ipswich spiritual and physical refuge to those uprooted by war. Grant request to help build a swimming pool for the children. *
La Colaborativa	\$1,000.00	\$1,232.50	\$2,232.50	Chelsea-based; work w/immigrants under duress. Grant request for their crisis stabilization program - emergency assist for appx 100 low-income households/year. Volunteer opportunities for WUS. Dinner with the president of the org on April 29 - ask Phil C and Liz B-S.
Lex RAP	\$1,500.00		\$1,500.00	Refugee asst' program out of Lexington;
Mission of Deeds	\$1,200.00		\$1,200.00	Household furniture for low-income and refugee etc. Assets and liabilities are equal, but they are w/drawing more than income for new truck
Network for Social Justice	\$1,400.00		\$1,400.00	Winchester community resource. Want to host community neighborhood dinners to encourage multi-cultural interaction and help neighbors get to know each other. Grant request is to cover costs of the events to be held at several faith congregations including WUS. We could host a dinner and waive our rental fee.
UU Mass Action	\$2,000.00		\$2,000.00	Grant proposal focused on their social justice activity, particularly a Rent Control campaign. They also do environmental action. Total budget \$348,000. Phil feels that some of the environmental work is more impactful and would like to ask us to give grant \$ but toward their climate justice and education on climate policy and ICE enforcement.
UU Urban Ministry	\$5,000.00	\$461.00	\$5,461.00	Based in Roxbury - mission to work against racial inequality. Grant helps keep the building and program running. Historically largest grant.
Volunteer Ventures, MA	\$500.00	\$2,110.00	\$2,610.00	Grant is focused on their wheelchair accessible picnic tables projects where they are built by volunteers.
Winchester ABC	\$1,000.00		\$1,000.00	Grant to support a summer enrichment program for the students. Overall cost is \$25,000 for the program.
<b>Totals:</b>	<b>\$18,600.00</b>	<b>\$8,639.50</b>	<b>\$27,239.50</b>	

\* incomplete Share the Plate for House of Peace

## Share-the-Plate Recipients for the fiscal year ending Aug 2026:

The table below lists the Share the Plate recipients as of April 27, 2026. We increased our focus on groups that support immigrants due to the current political climate.

Fern Remedi-Brown introduced Sowing Opportunities as the Share-the-Plate on March 29, 2026.

Date	Organization	Amount	Total for Organization	Comment
7-Sep-2025	Union of Concerned Scientists	448.50		
14-Sep-2025	Union of Concerned Scientists	466.00	914.50	
21-Sep-2025	La Colaborativa	419.50		
28-Sep-2025	La Colaborativa	434.00		
5-Oct-2025	La Colaborativa	379.00	1,232.50	
12-Oct-2025	Council of Social Concern	452.50		
19-Oct-2025	Council of Social Concern	454.00		
26-Oct-2025	Council of Social Concern	528.50		
2-Nov-2025	The Dwelling Place	493.00	493.00	For Meals Served
9-Nov-2025	Slingshot	379.00	379.00	
16-Nov-2025	For Council of Social Concern	485.00	1,920.00	Thanksgiving Baskets
23-Nov-2025	Boston Alliance of LGBTQ+ Youth	657.25	657.25	
30-Nov-2025	United Response Fund	388.50	388.50	
7-Dec-2025	LUCE Network (c/o Neighbor to Neighbor)	761.00	761.00	
14-Dec-2025	Bridge Over Trouble Water	702.50		For \$25 holiday gift certificates for Youth there
21-Dec-2025	Bridge Over Trouble Water	431.00		
24-Dec-2025	Associata Gondsi seles Segelyszervezet	2,510.00	2,510.00	
28-Dec-2025	Bridge Over Trouble Water	282.50	1,416.00	
4-Jan-2026	India Wood - UJME	648.50	648.50	
11-Jan-2026	Refugee & Immigrant Assistance Center (RIAC)	795.84		
18-Jan-2026	NAACP	504.00	504.00	
25-Jan-2026	Volunteer Ventures Soup Jars	681.50		
1-Feb-2026	Volunteer Ventures Soup Jars	821.00		
8-Feb-2026	Volunteer Ventures Soup Jars	607.50	2,110.00	
15-Feb-2026	International Institute of New England (IINE)	511.50	511.50	
22-Feb-2026	The Beyond Bond & Legal Defence Fund	831.50		
1-Mar-2026	The Beyond Bond & Legal Defence Fund	666.91		
8-Mar-2026	The Beyond Bond & Legal Defence Fund	529.50	2,027.91	
15-Mar-2026	The Yesod Fund	606.50	606.50	
22-Mar-2026	Refugee & Immigrant Assistance Center (RIAC)	732.50	1,528.34	
29-Mar-2026	Sowing Opportunities	575.50	575.50	
5-Apr-2026	UU Urban Ministries	581.00	581.00	
12-Apr-2026	Gardens for Good	473.00		
19-Apr-2026	Gardens for Good	540.50	1,013.50	
26-Apr-2026	Brother's Keeper 617			
3-May-2026	St. Mary's Center			
10-May-2026	Louis D Brown Institute for Peace			
17-May-2026	Dwelling Place			For Meals Served
24-May-2026	House of Peace			
31-May-2026	Strong Girl's, United Women			
7-Jun-2026	House of Peace			
14-Jun-2026	House of Peace		0.00	
		20,778.50	20,778.50	

## Transitional Team

transition-team@winchesteruu.org

**Members:** Zareen Karani Araoz, Roberta Brown, Vicky Coccoluto, Sarah Milt, Woody Wood, Rev. Seth Carrier-Ladd

Last year's Transition Team was requested by the Standing Committee through Rev. Seth, if they would be willing to serve to help the congregation build their Covenant. The Team agreed to do so.

As a Benchmarking, information-gathering process, we looked at Covenants of 3-4 other churches. Each was formatted a little differently, but focused on the values they aspired to, in their relationships and interactions with each other. We then called several meetings of the congregation on Sundays after church and additional Zoom meetings, to reach the maximum number of congregants and ensure maximum participation. Congregants seemed very enthusiastic, thoughtful and candid, and surprisingly, convergent about our Values.

We then asked the Congregation to prioritize them, after which we compiled the copious work of the different groups into a more concise document, keeping the values and sentiments expressed. Then the Transition Team tried to make it a "one pager", without losing the essential elements of what the congregation had expressed.

We presented the Final draft (attached here) to the congregation, and received mainly supportive feedback. There were some hesitations, since we could not fit everything in, as even some Team members wanted to!

The Team worked hard to reach this final draft and wish to express our thanks to Rev. Seth for guiding us through the process. Everyone pitching in their best efforts for this important work defines what WUS is all about. The Transition Team is pleased to present our final draft officially to the Congregation to pass and adopt at the Annual General Meeting.

This Covenant should serve as setting the tone for many congregant and church interactions. How this will be distributed, understood, implemented and embraced will be addressed, we hope, in the next year.

Respectfully submitted by your Transition/ Covenant Team

Zareen Karani Araoz, Roberta Brown, Rev. Seth Carrier-Ladd, Vicky Coccoluto, Sarah Milt, and Woody Wood

## Congregational Covenant

As a church that cares deeply about how we relate to one another, we covenant to:

- **Nurture** a warm, open-minded, and welcoming community by spending quality time together and seeking deeper connections.
- **Communicate kindly**, clearly, and honestly, making sure everyone's voice is heard and listened to with respect and curiosity. We are open to feedback and mindful of how our words and actions impact those around us.
- **Practice inclusivity**, welcoming all and honoring different perspectives and cultures.
- **Show up** for one another and care for each other. We notice when others are absent or in need and we reach out.
- **Embrace fun**, joy, and playfulness in our interactions with each other, encouraging creative engagement with the arts.
- **Encourage and support spiritual growth** and exploration in each other, sharing our questions, struggles, and journeys.
- **Stay in relationship** through conflict and maintain respectful engagement even when we disagree. We strive to understand each other's perspectives and take responsibility for our actions. We seek reconciliation if harm has been caused and offer forgiveness as we are able.
- **Take responsibility** for the life of the church by stepping into volunteer and leadership roles, nurturing new leadership, and financially supporting the congregation, as time and space in our lives allow.
- **Build trust** and strengthen the ties of community by honoring boundaries - our own and each other's. We keep each other's confidences when asked. We hold one another's trust and vulnerabilities sacred.
- **Foster intergenerational engagement** and commit to meeting the diverse needs of all ages in our congregation.

## Trustees of Permanent Funds

tpf@winchesteruu.org

**Chair:** Rebecca Keller

**Members:** Pete Baldwin, Denise Pappas

**Members Continuing:** All

**Meetings Schedule:** Quarterly, and as needed

### 2025-26 Report for Fiscal Year End March 31, 2026

#### ESG Mandate

At the direction of the Congregation, the WUS Permanent Funds are invested exclusively in funds using ESG<sup>1</sup> factors in their investment selection process. As shown in the table below, the WUS portfolios' performance was close to their ESG blended benchmark.

All WUS equity funds are rated 4 or 5 “sustainability globes” by Morningstar. Five of six WUS equity funds received Morningstar’s “low carbon” designation, while the sixth was unrated.

Cumulative annualized returns for periods ending March 31, 2026		
	<u>1-year</u>	<u>Since inception (Oct 31, 2011)</u>
<b>Unrestricted</b>	13.3%	9.0%
<b>Restricted</b>	13.1%	9.0%
<b>ESG Benchmark</b>	11.5%	
<b>Non-ESG Benchmark</b>	14.5%	

Source: LPL Advisory Performance reports as of March 31, 2026

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

## Holdings

As of March 31, 2026, the WUS portfolios were invested in the following funds. This list does not constitute investment advice nor the solicitation to buy or sell any of these securities.

- |  |   |
|--|---|
| > iShares ESG Optimized MSCI USA ETF       | > iShares ESG Aware MSCI EM ETF             |
| > Parnassus Mid-Cap                        | > Calvert Bond Instl                        |
| > iShares ESG MSCI KLD 400 ETF             | > Calvert Short Duration Income Instl       |
| > iShares ESG Aware MSCI USA Small Cap ETF | > Calvert Ultra-Short Duration Income Instl |
| > Impax Intl Sustainable Economy Instl     | > Nuveen Core Impact Bond Fund              |

## Collateral Obligation

To finance the installation of new solar panels on the WUS rooftop, a loan of \$36,800 was secured from the Cornerstone Fund, a United Church of Christ affiliated group that helps local churches and non-profits “create change within their communities.” The Trustees of Permanent Funds made available \$43,500 of unrestricted assets to serve as the required collateral. The loan is for 30 years, but the Treasurer and Standing Committee expect that this low-rate 5% loan can be paid off within a few years. Assets are invested in the Nuveen Core Impact Bond Fund.

## Additions to the WUS Permanent Funds

The WUS is extremely grateful for our restricted fund donors - Walter Swap, Larry Banks, and the WUS Music Committee.

\$2,360 to the Susan Swap Memorial Music Fund

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

In addition, this year we gratefully acknowledge a gift from the estate of Warren Orr.

\$20,000 to the Unrestricted Account of WUS Permanent Funds

Warren, a long-time WUS member, is fondly remembered by his many friends here. Warren also wanted his close friends, Rick Hochman and Willian Gray, to be remembered for their contributions.

Please contact any of the Trustees at any time with questions or if you wish to contribute to the unrestricted fund or 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, \$147,733 was distributed from all accounts comprising the WUS Permanent Funds during the Trustees’ fiscal year ending March 31, 2026.

- **\$21,692 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.

- **\$125,762 from the Unrestricted Funds:** These Funds support general operating expenses with four approximately equal distributions during the Church fiscal year. Recurring distributions are based on:
  - The historical 3-year rolling average of the portfolio value as of 3/31, 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 and Sam Shepherd and their team at Shepherd Financial Partners. In particular, SFP devotes considerable time and resources to support our ESG goals. And they were an indispensable resource when dealing with last year's collateral action.

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 Denise Pappas, Pete Baldwin, and Rebecca Keller.

May 2026

## Supplementary Information for FY Ending March 31, 2026

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

Benchmark Components	Allocation	1-year Annual Performance as of 3/31/2026			
		ESG		Non-ESG	
US Large Cap Equity	45%	MSCI USA ESG SELECT	14.17%	S&P 500	17.80%
Fixed Income (US)	30%	Bloomberg Barclay's Agg*	4.35%	Bloomberg Barclay's Agg*	4.35%
International Equity	10%	MSCI EAFE ESG Leaders	18.60%	MSCI EAFE	21.88%
US Mid-Cap Equity	10%	MSCI Mid USA ESG Leaders	10.05%	S&P Mid	17.35%
US Small-Cap Equity	5%	MSCI Small USA ESG Leaders	19.55%	Russell 2000	25.72%
<b>TOTAL</b>	<b>100%</b>	<b>ESG Blended Benchmark</b>	<b>11.52%</b>	<b>Non-ESG Blended Benchmark</b>	<b>14.52%</b>

Returns reported net of overseas taxes

### B. Account Values - at Trustees' FY End 3/31/2026 of Permanent Funds

	Market Value	Cash Flows during Trustees' Fiscal Year ending 3/31		Adjusted Market Value as of 3/31/2025	Market Value 3/31/2026	1-Year Gain (Loss)	
		Inflows	Outflows			\$	%
<b>Unrestricted Funds</b>	\$2,627,602	\$20,000	\$125,762	\$2,521,840	\$2,860,284	\$338,444	13.4%
<b>Restricted Funds</b>	\$881,725	\$3,360	\$21,692	\$863,393	\$976,746	\$113,353	13.1%
<b>Total</b>	<b>\$3,509,327</b>	<b>\$23,360</b>	<b>\$147,454</b>	<b>\$3,385,233</b>	<b>\$3,837,030</b>	<b>\$451,797</b>	<b>13.4%</b>

### C. Planned Distributions - for WUS FY End 8/31/2027 from Unrestricted Funds

Calculation of Total Distribution for Church Fiscal Yr. 2026 to 2027					Church Fiscal Year Ending 8/31/2027			
Market Value as of March 31	Average MV for 3 Most Recent Trustee Fiscal Yrs	Distribution Rate	Total to be Distributed	Timing & Dollar Amounts				
				2026	2027			
				Dec	Mar	Jun	Aug	
2024 \$2,616,740								
2025 \$2,627,602	\$2,701,542	x 5.0%	= \$135,077	\$33,700	\$33,700	\$33,700	\$33,977	
2026 \$2,860,284								

**Trustees' Year End: March 31, 2026**  
**Total Portfolio Value: \$976,746**

**\*\*Distribution Codes & Designated Distr. Rates**  
 tbd = To be determined, may be used for internship  
 tbd-I = To be determined, may only be used for internship  
 D = Distribute on demand  
 A = Automatic 5%

**\*Distribution Sources**  
 Inc = Income Only  
 I&P = Income & Principal

Restricted Funds	Fund Values		Distributions			Additions	Adjusted Fund Values		Fund Values (at Trustees' Fiscal Yr End)	Estimated Distributions For Upcoming WUS Fiscal Yr
	(at Trustees' Fiscal Yr Start)	(at Trustees' Fiscal Yr End)	Source*	Code**	Rate		Amount	\$ Value		
Stanton	1,115		Inc	A	5%	56	1,059	0.1%	1,198	\$60
Pratt	533		Inc	A	5%	27	506	0.1%	573	\$29
Parkhurst Organ	7,933		Inc	A	5%	397	7,536	0.9%	8,526	\$426
Nash Nursery-1	8,888		Inc	A	0%	0	8,888	1.0%	10,055	\$0
Borden	4,738		Inc	A	5%	237	4,501	0.5%	5,092	\$255
Storer Mem	81,119		Inc	tbd-I	5%	0	81,119	9.4%	91,768	\$0
Spaulding Mem	62,332		Inc	tbd	5%	0	62,332	7.2%	70,516	\$0
Reinhardt	65,716		Inc	tbd-I	5%	0	65,716	7.6%	74,343	\$0
Sue Swap	74,647	2,360	Inc	A	5%	3,732	73,274	8.5%	82,894	\$4,145
Sandy Fries	8,350		Inc	D	0%	0	8,350	1.0%	9,446	\$0
Spencer	56,133		Inc	tbd-I	5%	0	56,133	6.5%	63,502	\$0
Trageser	4,075		Inc	tbd	5%	0	4,075	0.5%	4,610	\$0
G. Cook	113,116		Inc	A	5%	5,656	107,460	12.4%	121,568	\$6,078
Banks Intern	19,859	1,000	Inc	tbd-I	5%	0	20,859	2.4%	23,597	\$0
Nash Nursery-2	11,717		I&P	D	0%	0	11,717	1.4%	13,255	\$0
Cummings	1,349		I&P	A	5%	67	1,282	0.1%	1,450	\$72
Bartlett	28,844		I&P	A	5%	1,442	27,402	3.2%	30,999	\$1,550
D. Nash	3,474		I&P	A	5%	174	3,301	0.4%	3,734	\$187
H. Hall	4,468		I&P	A	5%	223	4,244	0.5%	4,802	\$240
C. and G. Cook	76,013		I&P	A	5%	3,801	72,212	8.4%	81,693	\$4,085
Caverly	1,221		I&P	A	5%	61	1,160	0.1%	1,312	\$66
Eustis	18,527		I&P	A	5%	926	17,601	2.0%	19,911	\$996
I Kelley	868		I&P	D	0%	0	868	0.1%	982	\$0
H. and F. Stone	128,834		I&P	D	0%	0	128,834	14.9%	145,748	\$0
Cerny-Thomases	17,002		I&P	A	5%	850	16,152	1.9%	18,272	\$914
Meditation Garden	19,461		I&P	D	5%	973	18,488	2.1%	20,916	\$1,046
The Baldwin Fund	61,395		I&P	A	5%	3,070	58,325	6.8%	65,983	\$3,299
<b>Total</b>	<b>881,725</b>					<b>21,692</b>	<b>863,393</b>	<b>100%</b>	<b>976,746</b>	<b>23,446</b>

Distributions from Intern-related funds: \$0

*Many thanks to those who donated to the Restricted Funds this year!*

## Youth Advisory

yac@winchesteruu.org

**Members:** Devon McClurken, Erin Graham, Michelle Crawford, Sally DeGan, Victoria Ippolito, Joi Loewy, Marcy Tompson (SC Liaison), Sam Wilson (staff) & Amelia Pellegrini (staff)

### Youth Advisory Committee (YAC) Members

The 2025–26 year was one of rebuilding, reimagining, and growth for both YAC and WUSYG. Early in the year, YAC adopted a new meeting structure designed to streamline meetings, encourage broader leadership participation, and allow for more focused discussions.

Throughout the year, YAC focused on strengthening youth participation, sustaining meaningful programming despite smaller group sizes, and supporting the continued growth of children and youth programming within the congregation. Although WUSYG remained smaller than in previous years, the group continued to foster strong relationships, meaningful service opportunities, and leadership development.

YAC also began broader conversations about long-term visioning and outreach. The formation of a Membership Growth Task Force for WUS, along with discussions around marketing, branding, and intentional visioning for WUSYG, reflected a desire to build sustainable growth and stronger visibility for youth and family programming within the congregation and wider community. We plan to continue these efforts at a visioning retreat in June and then Sam will work on outreach as a special project over the summer.

### WUSYG Events and Programs

#### Opening BBQ (September)

The year began with the annual WUSYG BBQ, welcoming returning and new youth into the program year. The gathering helped establish community and reconnect participants after the summer.

#### Community Dance (October 5)

The Community Dance once again provided an opportunity for youth engagement and intergenerational community-building early in the program year.

#### Haunted House Fundraiser (October 31 & November 1)

The Haunted House fundraiser was one of the most successful and ambitious events of the year. Although the event was not coordinated by YAC, it was co-led by Sam and YAC member Victoria, and was a significant part of our youth ministry in the Fall.

Attendance far exceeded expectations, with approximately 150–200 attendees on Friday night and nearly 400 attendees on Saturday. The event drew support from multiple high school drama clubs, significantly enhancing the quality of performances and volunteer participation.

In addition to serving as a major fundraiser, the Haunted House became an important outreach and community-building opportunity. It successfully brought together youth, adults, families, and

community partners in an intergenerational effort. The fundraiser raised approximately \$2,000 toward youth programming and service trip costs, plus an additional 4k+ for the WUS operating budget.

The committee also identified several lessons for future years, including scheduling the event earlier in October to improve volunteer participation and creating more intentional social and concession spaces to encourage community connection.

### **Fall Retreat (November 21–23)**

The annual Fall Retreat remained an important bonding experience for WUSYG youth. Despite the smaller size of the group this year, the retreat was reported as highly successful, with strong group dynamics and meaningful opportunities for reflection, connection, and fun.

### **Holiday Party with Alumni (December)**

WUSYG continued its tradition of hosting a holiday gathering that welcomed both current members and alumni. The gathering included games, food, gift exchanges, and opportunities for reconnecting across generations of youth group participants. WUSYG and alums also decorated a magnificent gingerbread house that Sally and other YAC members constructed, which was an exact replica of the WUS church building. Members of the congregation later bid to keep the “house” on display at WUS, which raised some additional funds for the service trip.

### **Dwelling Place Meal Service (May)**

Youth participants continued their service partnership with the Dwelling Place, preparing and serving 2 meals as part of ongoing efforts to engage youth in local service work and conversations around food insecurity and community care.

### **Chili Cook-Off Fundraiser (March)**

The annual Chili Cook-Off remained an important fundraiser and community event. Combined with the Haunted House fundraiser, the event helped meet this year’s more modest fundraising goals due to the smaller service trip group size.

### **Service Trip (April)**

Planning work took place this year around WUSYG service trips. While previous years often included larger groups, this year’s anticipated service trip participation was smaller, with 7 youth participants. As a result, the Boston-based model was decided as most appropriate and repeated. It balanced service, UU identity, and accessibility.

Sam explored opportunities for collaboration with neighboring congregations, including Watertown and other UU communities, in order to increase participation and create stronger regional youth connections. Discussions also continued around future trips to West Virginia and other out-of-state destinations, possible Boston-based service opportunities, and the potential for renewed partnership church connections in Romania.

## **OWL (Our Whole Lives)**

OWL programming remained an important component of youth ministry this year. The program enrolled 16 participants and focused intentionally on fostering safe, inclusive, and respectful group dynamics. Four facilitators worked thoughtfully to support participants through behavioral challenges while maintaining a welcoming and supportive environment.

Additional programming included LGBTQ-focused conversations and panels that encouraged meaningful discussion and respectful engagement among participants.

## **Membership Growth, Outreach, and Visioning**

A focus this year involved discussions around outreach, marketing, and the future vision of WUSYG and youth programming more broadly.

These conversations were informed by encouraging growth in children's religious education participation in recent years, creating hope for future growth in WUSYG participation as younger children move into youth programming.

## **Staffing and Leadership Development**

This year involved staffing transitions and development. YAC and staff continued searching for additional youth ministry support early in the year, eventually welcoming Amelia Pellegri into a combined nursery care and assistant youth ministry role.

Amelia quickly built positive relationships with youth participants and families and became an important part of the youth ministry team.

YAC members themselves also stepped into expanded leadership roles this year, including co-chairing responsibilities, meeting facilitation, and collaborative planning. The committee's willingness to adapt and share responsibilities helped sustain momentum during a year of transition and rebuilding.

## **Looking Ahead**

Looking ahead to 2026–27, YAC hopes to continue strengthening youth participation, deepen community partnerships, and further develop long-term visioning and outreach strategies.

Plans already underway include:

- Intentional discernment and visioning of WUSYG (planned for June 13th)
- Continued work on strengthening WUSYG identity, sustainability, and visibility within the congregation and wider community
- Continued development of marketing and outreach effort
- Collaboration with other UU youth groups
- Future service trips, including West Virginia and Boston models
- Expanded intergenerational programming opportunities
- Continued support for OWL programming and youth leadership development
- Despite the challenges of a smaller youth group and ongoing transitions, this year reflected resilience, creativity, and a strong commitment to supporting youth connection, service, and belonging within the congregation.

