UNITARIAN SOCIETY OF GERMANTOWN

JUNE 2026



ANNUAL REPORT

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Minister's Report

Submitted by: Rev. Hannah Capaldi

Year Two of our shared ministry together brought more change and more conflict. The majority of it was healthy and generative as we learn how to be in an intentional, covenantal community together that contains multitudes! Some pointed out our tender spots and growing pains around bridging divides across age and experience and moving at the speed of trust to accomplish our shared goal: making the Unitarian Society of Germantown a place where transformational Love is at the center of our lives.

By many measures, the congregation is thriving: we are currently averaging 154 people in the building on any given Sunday, with 122 of those in the Sanctuary and the remaining 30 or so spread across our Children's Spiritual Development program. We welcomed 32 new folks into membership and reactivated a couple folks who drifted away and have returned. Our Welcome Table has done a remarkable job at providing a landing place for visitors and newcomers as they seek out more information and learn how to take next steps. We are seeing new faces each and every week. By the close of our congregational year, we will have dedicated five children to the congregation, in contrast with just one last year. Sunday services continue to be the anchor of our shared ministry and providing excellent worship will remain a priority for me in the next year.

Our fundraising efforts included an End of Year Appeal, a Cabaret & Silent Auction, and a Pledge Campaign. All three endeavors were successful, hitting important marks towards us having a balanced budget at the end of this fiscal year, but we saw and heard of some donor fatigue and we saw a slight fall in the average pledge amount, especially among long time members. As running a values-driven organization gets ever more expensive (more people means more toilet paper! More healthcare needed for staff! Utility bills of eye popping amounts!), the congregation will need to assess how generosity is expressed and deepened in this community. And to grow our rentals program!

We re-worked the Path to Membership as we identified places folks needed additional education about Unitarian Universalism and about USG. Our Newcomer Series now has four parts: UU Theology with me, a Circle Worship session with Zoe Johnston, an Archives session with Carolyn Cotton and Susan Bockius, and a Building Tour with Paula Behrens. We want there to be a consistent container for all those just finding us to move with intention and care towards the commitment of membership.

I called a Committee on Ministry this year, to help manage the process of accountability around my relationship with Hunter, who has since departed for another job. The Committee on Ministry is tasked with managing repair when there's been breaches of covenant. With Deborah Coleman, Amy Birge Caracappa, Linda Bernstein, and Jody Hill, we've done good work this year to establish how we want to work together and how we see the institution responding to conflict as we grow and continue being human together.

Lastly, I want to extend deep gratitude to my staff. Each of them is so very dedicated and excellent at what they do. This congregation would not be as vital without their professionalism and commitment.

Children's Spiritual Development

Submitted by: Zoë Johnston, Director of Spiritual Development

Members of Committee - indicate chair(s) and note upcoming changes
Zoë Johnston (DSD), Brandi Kirksey, Emily Joy Goldberg, Sharon Mafuru, Treva Burger

Please offer a reflection on the work done by your team this year. Include specifics such as major projects completed, milestones, challenges, initiatives, etc

The story of Children's Spiritual Development this year is one of meaningful community building. In our report last year, we said that **our goal was to make USG a place where our kids and youth wanted to be. We are proud to report that we have achieved that goal.** Every Sunday, we witness kids that are excited to see each other, looking forward to going to CSD, sharing their joys and sorrows, making thoughtful contributions to group discussions, and taking the work of being in a spiritual community seriously. They are building a real commitment to each other and showing up again and again.

We spent time reflecting on CSD in our classes to prepare for this report. Across all ages, our kids and youth said that the role of USG is to build community. They said that we are here to grow together and belong to each other. When the kids reflected on their favorite parts of CSD, they mentioned getting to play, getting to connect with each other, making art, supporting each other, and talking about our values together.

Another piece of reflection that the kids offered was how much **they love having lunch** on Sundays. Lunch is the time where they get to connect with their friends, plan play dates for the week, and enjoy exploring the grounds, including the playground. From a faith formation perspective, it's also a moment when the kids are fully integrated into the community and interacting with adults that they would be unlikely to see otherwise.

A goal that we set last year was to improve our retention rate. In the previous years, we had only retained about 50% of our registered kids and youth each year. This year, **we retained 79% of our kids** from the 2024-2025 year. The importance of retention shows in the depth of connection that the kids and youth now have with each other.

Although our focus has been on sustaining and deepening, our program continues to grow. We ended last year with 65 kids involved and 45 families. At the end of this year, we have 77 kids involved in our program and serve 49 families. If you include kids and youth in the total congregational membership numbers, they **represent about 20% of our congregation**. Our

average attendance on Sunday mornings was 29 kids and youth, across the Wiggle Room and our five curriculum groups.

We had **five different curriculum groups** this year. We used many of our same curricula from last year and continue to find that it fits the needs of our groups. Zoë often writes lesson plans to be more responsive to what's happening in the congregation or world at large. This included lesson plans about solidarity during ICE escalation in Minnesota.

- Pre-K/Kindergarten used the Rainbow Connection curriculum and met next door at the Cooperative Nursery School
- 1st and 2nd grades used the Lego ValUUes curriculum and met in Sullivan 1
- 3rd-5th grades loosely used the EPIC curriculum and met in Sullivan 2
- 6th-7th grades loosely used the Games to Build Community curriculum and met in Daskam
- 8th-10th grades were in Coming of Age (loosely used the Soul Matters curriculum and met in Sullivan 3

Two major successes from the year were our kid and youth led services. Our CSD Service in April was a group effort entitled "We All Play" and involved over 20 kids throughout the process. There was a strong sense of ownership that we cultivated from the brainstorming process all the way through the rehearsal. We've tried to replicate this sense of ownership across all of the experiences in CSD and it's created a sense of buy-in. Our Coming of Age service in May was similarly youth-driven and it celebrated 10 youth as they 'come of age.'

Our main initiative this year was to expand our pool of trained OWL facilitators. This was for both the K/1 and 7th-9th age groups. A total of **seven people received OWL training and certification** by the UUA. We went over budget significantly in order to make these trainings financially accessible . The CSD Budget for next year will be increased to meet this need for ongoing training, both for OWL and Mosaic curricula.

Our ongoing challenge is the number of volunteers that are involved. **Our number of adults involved in CSD dropped from 40 last year to only 32 this year.** However, we also expanded the number of CSD age groups this year and prioritized having two adults in each room. These two pieces of information together reveal that the program relies heavily on a small group of regular volunteers. However, this group of volunteers have become comfortable in the CSD classrooms and are incredibly talented at finding ways to explore our shared values with our kids and youth.

We've found that we need to increase not only the quantity of volunteers, but the quality of the time that they spend with the program. Our program runs the most smoothly when volunteers are with CSD on a regular basis because they form meaningful relationships with the kids, develop

confidence teaching our shared values, and have a clear understanding of what needs to happen on Sunday mornings. Our ideal CSD volunteer would be someone who could commit to being with one group of kids twice a month over the course of a full congregational year. **We need about 24 volunteers** at this level of commitment for CSD to be fully supported next year.

We offered three teacher trainings this year, one each season. Beyond covering how our program is run and safety logistics, we also explored topics like sensory needs, phone usage, and how to improvise in the moment. We found this schedule of training to work well and will replicate it next year.

Please tell us your group's plans for the upcoming year

Last year our work was growing the amount of kids and youth that were in CSD. This year our work has been sustaining and deepening those connections. This coming year our work will be to grow once again - expanding our offerings, inviting more adults into the programs, finding new, fun ways to build community together, and listening to where our kids and youth want to take us.

Now that we have enough trained facilitators, we'll be running our first K/1 OWL cohort in the fall. We expect to have 8-10 kids taking this eight-week course. Expanding our OWL programming feels important in this political moment so that even our youngest kids are receiving information that affirms consent, bodily autonomy, and gender expansive expression and experiences. This will also be a chance for parents to develop their skills as sexuality educators and to practice using our UU values in conversations with their kids. We also hope that OWL builds a sense of community amongst our youngest members that they can continue to build on throughout CSD.

We will be relaunching a high school youth group in the fall. This is the first time in at least three years that we've offered a high school youth group and so will essentially be starting from scratch. We'll begin the year with an overnight retreat in the fall and then collaboratively develop our programming with the youth. Our hope is to build a space that empowers youth leadership, creates opportunities for spiritual engagement, and is well supported by trusted adults.

We'll be working to recruit more adult volunteers to CSD, both to be involved on Sunday mornings and to be on our Committee. We're aware that our goal of recruiting volunteers who can commit more time and energy to CSD also requires more work on our end. The CSD Committee hopes to spend more time sharing out how special it is to be an adult in CSD, create easy on-ramps to get involved, and host events that help our volunteers feel more connected to each other. One way we hope to build cohesion with our CSD adults is a renewed commitment to teaching teams. These are the adults that will stay with one group of kids across the course of the year and we'll encourage more moments of connection between the adults this coming year.

One change that we're planning to make is **shifting our sign-up model**. For the past two years, adults have signed up using a spreadsheet to indicate when they're free. While this worked well to honor the limited capacity of parents, it has left us filling gaps on a weekly basis. This year we'll be experimenting with making a monthly schedule that tells people when they will be with CSD. Volunteers will then be encouraged to switch Sundays or find a replacement as needed.

From a curricular perspective, much of it will stay the same. However, we hope to incorporate the Mosaic curricula into our classes after getting more of our CSD volunteers trained as facilitators. Another change that I hope to make is setting a theme for each month that will inform which lesson plans we use and create a sense of cohesion across our five groups. These themes will likely be our shared values with the addition of 'Welcome' and 'Covenant.'

Adult Spiritual Development Annual Report 2025-2026

Members of Committee - indicate chair(s) and note upcoming changes
Zoë Johnston (DSD), Janet Haas (chair), Jenn Leiby, Susan Bockius, Gale Gibbons

Please offer a reflection on the work done by your team this year. Include specifics such as major projects completed, milestones, challenges, initiatives, etc

High Level Summary:
This year in Adult Spiritual Development (ASD), we began the work of broadening and deepening the opportunities for spiritual development. The committee frequently discussed how to engage the community with varied and diverse programming. Successes included a first ever Women's Retreat, attracting women of all ages; a full day trans-inclusion workshop that drew people from the wider community in addition to USGers; and an innovative Newcomer's Series that offers opportunity for visitors and members alike to deepen their knowledge and connection to USG. As this church year ends, we feel hopeful that the ASD program will broaden even more, especially with use of the new program planning initiatives.

More Detailed Summary:
We began our year with another successful **Community Day**. Our ASD Committee Chair, Janet Haas, organized this event and we had 20 different groups/committees represented. One change that we made from last year was pushing it until the first weekend of October instead of on Ingathering Sunday. This seemed to be successful as people had time to settle back into their church routine before committing to something new.

Feminist Thealogy continued to offer thoughtful workshops on a monthly basis and regularly had at least 20 people in attendance. Although Feminist Thealogy primarily hosted their programs after service on Sundays, they experimented with a 6pm Sunday movie night and watched *Whale Rider* in the Sanctuary. There was great turnout and discussion, which lets us know that evening workshops are an opportunity for all ASD programs to consider.

One major success of the year was our **Women's Retreat** in April. This idea emerged out of the Feminist Thealogy group over the summer but was brought to fruition by Clare Pisoni. The day-long retreat happened in mid-April and was hosted at the wonderful Cranaleith Retreat Center. There were 23 attendees and one major piece of feedback was an incredible opportunity to make connections with people that were previously only familiar faces. Specifically, getting to know women of different generations. We hope to bring the retreat back again next year.

Our annual **Men's Retreat** happened in November and also had good turnout with 18 attendees. They spent the weekend at Temenos Retreat Center and were joined by Jesse Frechette for a mindfulness workshop. The Men's Group has continued meeting throughout the year.

Earth Honoring rituals have become a regular way that we marked the turning of the seasons. We celebrated the Fall Equinox with the help of local labyrinth guide Athena Duggan, marked the Winter Solstice with the annual fire wheel and a Sunday morning service, welcomed the return of spring by collaborating with Feminist Thealogy, and even marked the halfway point between spring and summer with live music and flower crowns on Beltane. The simplicity and regularity of these events continue to lend themselves to solid turn out.

This year we experimented with bringing in outside facilitators for events. In October, **Demo Rinpoche**, a Tibetan Buddhist monk, joined us for an interfaith dialogue with Rev. Hannah. There were about 45 people in attendance for the rich conversation exploring themes of justice and suffering. We would like to continue offering interfaith programs or those that otherwise embrace the pluralism of our beliefs.

In the winter, there was a book club on ***The Four Agreements*** by Don Miguel Ruiz. This group met for eight weeks over Zoom. There were plenty of thoughtful discussions and new connections, reminding us that Zoom is still a useful way to meet for ASD programs. In many ways, it made the book club more accessible and easier for people to participate.

We also hosted some events purely for fun and community connection! As part of the Spooktacular in the fall, we had a ***Rocky Horror Picture Show*** movie night. There were over 70 people ranging from teens to elders, first time watchers to long time fans. Although there were more expenses involved than most of our other programs, we charged for tickets and broke close to even. In the spring, DJ Mike Rogers joined us for the **Third Annual Sexton's Ball**. People of all ages danced the night away in the Edna Jones Assembly Room.

We hosted two different full-day events over the course of the year. In January, we had our annual **MLK Day of Service.** As always, there was great turnout and the building was filled with people of all ages giving back to the community. In April, we were a satellite site for the **Building Beloved Community Beyond the Binary** conference hosted by a UU congregation in New York. There were workshops for both people who identify as trans, non-binary, or gender nonconforming and also for cisgender people who are seeking to deepen their knowledge and solidarity. We'd like to pursue more programs like this that are based in information sharing, skill building, and political education but still deeply relational.

We launched our **Newcomer's Series** in February which sought to provide more touchpoints for visitors who want to learn more about USG before they commit to being a member. We thought about 'Newcomer's as a broader term that would include anyone who wanted to reconnect with USG or deepen their knowledge of this place. Our series included four workshops: Theology 101, Building Tour, History of USG, and Circle Worship. Since February, there have been about 50 people that have attended the workshops. We hope to keep it going in the fall.

Challenges

- We continue to be a small committee. Without representatives from all of the groups, some of our information comes from observation rather than direct communication..
- Additionally, because of our small size, the committee isn't able to initiate as many programs and relies mainly on ideas that organically emerge from the community.

Please tell us your group's plans for the upcoming year

In the upcoming year, we hope to make it easier for members of the congregation to both offer and participate in ASD programs.

We're creating a proposal form where anyone can submit program ideas to the ASD committee. We've heard many great ideas over the course of the year but have also noticed that people don't always know how to implement a program. This form will be the resource that people are directed to. Within the form itself, the questions are structured to streamline the process from ideation to implementation. Our ongoing work will be getting the congregation to use the form in a timely manner. In fact, you can access the form using this link: bit.ly/ASDProposal

We plan to start structuring our ASD programs on a seasonal basis. As of now, our vision for these seasons is September-November, January-March, and April-June. Working with a seasonal structure, the Committee will have opportunities to communicate about programs on a more regular, scheduled basis and offer a diversity of programs across the entire year. We would like to run at least one offering each season where we bring in an outside facilitator or speaker. These would likely require a registration fee, but would be valuable for congregational skill and knowledge development.

On the participation side of things, we hope that the proposal form and the seasonal structure will lend itself to recreating an ASD Catalog. For many years, USG used a physical catalog to lay out the different ASD offerings and the Committee would like to return to this practice.

In summary, we hope to support the robust programs that are already happening within the congregations while putting structures in place that allow us to expand and diversify our ASD programs while also increasing participation.

Director of Music Ministries

Submitted by Stearns Matthews

Please offer a reflection on the work done by your team this year (7/2025- 6/2026). Include specifics such as major projects completed, milestones, challenges, initiatives, etc,.

As I round out my second full year here at USG, I'm reflecting on the many different ways our music ministry has grown. The one that astonishes me most is the increase in participation from you. Our choir roster has grown from 28 to a staggering 44 (you usually see about 25 on the chancel – not everybody is there every time). More USG musicians have "outed" themselves to me and are playing in services more often. Our cabaret fundraiser introduced voices from members of this community we didn't know could carry a tune. As I reflect on growth, I'm thinking… MORE PEOPLE doing music. That's growth. We're doing it! In addition to our own folks who occasionally join us on Sundays to play (Becky Horner, Wyatt Schroeder, Mariama Koroma, Aria Manes to name a few), we've had many professional guests this year, especially at our "big" music services – Christmas Eve (when we hired singers, trumpet, drums, bass, and woodwinds), Easter (organ and trumpet), and our all-music service (two woodwind players, guitar/banjo, violin, and drums). The sanctuary has been alive with music! Our multigenerational PopUp Choir had several outings this year and will help us round out the year for our Flower Communion service on June 14th. In April, USG produced a cabaret/silent auction night that raised over $11,000, for which I served as producer and emcee. To say I'm proud of that night would be an understatement! So much credit and gratitude to the cabaret team: Sarah DiGioia, Charles Gabriel, Jody Hill, and Marjorie Winther; and the auction team: Alana Carroll, Emily Flemming, and Tammi Talde. In May we had our all-music service, "The Lovers, the Dreamers, and UU: Our Shared Values in the Music of the Muppets." My prep for this — choosing music, orchestrating, reflecting on our shared values, research, writing, creating the visual components, rehearsal — was as much a joy as the actual morning. USG's congregational singing has come so far since my arrival. Last year in my report I expressed my hope to sing more rounds in worship, and you've sounded beautiful every time! I love making music with you on Sundays.

Please tell us your group's plans for the upcoming year.

In addition to sustaining growth of the choir and USG musicians, I hope to develop a smaller, chamber choir that would sing a more challenging repertoire. I also hope to create a Sunday afternoon concert series starting in the fall – we'll likely start with an every-other-month model and increase the following year if it's successful. This venture is meant not only to enrich USG's musical life, but also to deepen our relationship with the surrounding musical community — makers and lovers alike. I love leading music-forward services but also feel at home leading more traditional worship and would love to do more of that in 26-27 — my service on November 9th, "Can't You Read the Sign?" was another high point for me this year. Want to make music with us? I always want to hear from you!

Board of Trustees

Submitted by: Carla Campbell

Members of Committee - indicate chair(s) and note upcoming changes

Carla Campbell, President; Bradley Flamm, Vice President; Keith Kratz, Secretary; Phillip Bullard, Treasurer; Susan Rizack; Deborah Coleman; Mary Kalyna; Eva Finney; and Sara Hertz. Carla, Phillip and Eva will cycle off the board in June 2026.

Who will be the chair of this committee in the coming year?

Susan Rizack will be board president, Deborah Coleman will be vice president, and Bradley Flamm will be secretary in the coming year.

Please offer a reflection on the work done by your team this year (7/2025- 6/2026). Include specifics such as major projects completed, milestones, challenges, initiatives, etc,.

The board welcomed our minister, Rev. Hannah Capaldi, into her second year at USG. We held a retreat in October 2025 and decided on several board goals for the year. Board Goal 1) To oversee the development of a new Mission and Vision Statement, forming a committee with Board representation and engaging an outside consultant as proposed by Rev. Hannah. The Board requests representation on the committee, regular updates, and opportunities for member feedback throughout the process. The board worked with Rev. Hannah to develop a process by which she, along with several board members and congregants, will create a new Mission and Vision Statement for USG. Board Goal 2) To continue to support anti-oppression, multicultural training for church leaders as recommended by the Widening the Circle of Concern report. Our goal is to get 5 people trained as facilitators for the UUA's Mosaic Platform curriculum. We held, in conjunction with the Ending Racism Committee, a concert and Sunday service featuring the Deeper Than the Skin group in September 2025 which promoted racial justice and understanding. We also have identified 4 congregants, including 2 interested board members, who have trained or will train as facilitators for the UUA's Mosaic Platform curriculum, to date. Board Goal 3) To create a board task force to review governing policies and procedures to report back to the Board. We created a task force which reviewed governing policies and procedures, recommended changes to the board, and came up with a process for periodic review of these in the long term. Board Goal 4) To create and implement a plan to have regular communication between the Board and congregation. We will provide at least one Listening Circle as a means to hear the voices of the congregation and determine whether to continue with additional Listening Circles or implement another method of regular communication between the Board and congregation. We held a Listening Circle in February 2026, where congregants could indicate what concern or issue was on their mind. It was attended by about 18-20 people. Most participants indicated that it was a worthwhile experience. The board will hold a second listening circle on Sunday May 31. In addition to addressing our four goals, in March 2026, in response to congregant concerns regarding expanding

availability of all-gender bathrooms, we sent out a survey on bathroom usage at USG. The board is now in the process of reviewing survey comments and formulating next steps. In April, we helped facilitate the special election for General Assembly delegates. Lastly, we are carrying out a ministerial review, as the board does on an annual basis.

Please tell us your group's plans for the upcoming year.

The board will develop a set of board goals at the fall board retreat, which will guide its work in the upcoming year. It will be involved in assessing the church's long-term financial health, approving the church budget, and carrying out the ministerial review. The board will guide the development of the new Mission and Vision Statement and the continuing review of policies and procedures.

Ministry Executive Team

Submitted by: Jody Hill

Members of Committee - indicate chair(s) and note upcoming changes

Rev Hannah Capaldi, Congregational Administrator Hunter McCorkel until Jan 2026, then Stearns Matthews until April 2026, then Kate Sparacio, and lay leaders Eric Foster, Margaret Thompson, Jody Hill

Eric will be rotating off the MET at the end of June and Paula Behrens has agreed to join us.

Who will be the chair of this committee in the coming year?

Rev. Hannah

Please offer a reflection on the work done by your team this year (7/2025- 6/2026). Include specifics such as major projects completed, milestones, challenges, initiatives, etc,.

The purpose of the MET is: The Ministry Executive Team (MET) manages the dayto-day operations of USG including spiritual and life-long learning programs and events, social justice activities, membership, caring, property, and finances. MET works within policies set by the Board and makes all significant decisions in collaboration with the Board. MET encourages the use of the Board's Strategic Initiatives and the congregational Mission Statement, Core Values and Intentions when the councils and committees are setting their goals, to assure that Board, council and committee priorities and goals are synchronous.

Our team met twice monthly in person and conferred by email and text when needed between meetings. We began the church year with a discussion about the roles we want our new sexton Chris to fulfill. The goal is to be consistent in describing him as "building Manager"rather than sexton to include some Operations tasks. So far we see that he has lots of energy and enthusiasm. Early in the season, it was decided that we advise Loida Zepeda, whose company had cleaned the church for many years, that we were re-distributing duties among our staff and that Mariama would expand her hours and assume cleaning duties.

Fellowship Hour lunches: Jody will step back from weekly management. Staff will decide on food offerings and Chris will order. Jody will continue to coordinate a monthly Soup Sunday potluck with congruent contributions.

Carolyn Cotton will continue in her role as rental coordinator with Administrator's back up and Jody met with her to review rental fees, increases proposed, and how she manages different situations. As most of her system is not computerized, she is happy to meet with Lynsey and transfer data to spread sheets and systems that other staff can access easily.

We opened our doors to Family Promise and sheltered a family in Bristol Room for a month in September. The family also returned for a few weeks in the winter. Church members volunteered to cook and bring meals for the family 3 times a week. There was a committee formed to support the FP families. There has also been a desire to come up with a place and funding to put in a shower. Building and Grounds committee will keep this on the longer term agenda.

We converted our first floor bathrooms to All Gender as the usual all gender bathrooms are accessed by passing through the Bristol Room. The change in restroom usage/signage created a need for continuous discussion about what is best practice.

A Committee on Ministry was formed to advise Rev Hannah and provide a sounding board for her to discuss difficult and thorny and important congregational issues. The COM plans to meet monthly.

Early in the fall, discussion ensued about the counting growth of the congregation and its associated costs, such that a year end fundraiser was proposed and executed. It was called Food for Thought. The committee members who have been planning and executing our annual auction fundraiser. This would create a significant gap in expected income in the budget. Stearns stepped up and proposed that he head a team to create and perform a Cabaret! As planning progressed, a silent auction was added to the program. All acts and performers were from the USG community and it was a rousing success and raised a large amount of money.

Susan Rizack stepped up and proposed new and improved disability signage.

The team who has planned and executed our amazing Martin Luther King Day of Service activities announced that they are stepping away from the project. We discussed and decided that we will take a pause for January 2027 in our usual activities and decide how and what we want our future MLK Day to look and what goals we want to achieve.

Our incredible administrator Hunter announced that they were seeking new employment and when Hunter accepted a position in January, a search began for a new administrator. Stearns expanded his role and served as interim administrator until Kate was hired and began working in April.

After the tragic events in Minneapolis in January and continuing ICE presence and activity, USG served as a meeting space for several large community events and teaching sessions.

With diminishing funds in the Edna Jones fund, MET discussed that B&G will need more structure around their processes to review and approve projects. We are not in a good position to take on unexpected projects and we need to consider how to prioritize. As we

approach budget approval time, Eric, our finance secretary, reminds us and everyone that inflation is a major issue in trying to predict and to balance the numbers.

Our stewardship campaign this year we called Woven Together in Love. The team worked diligently with lots of personal contact and incredible digital resources led by Lynsey. As of this date in mid May it appears that we reach or be very near to our goal!

Eric will be rotating off the MET at the end of June and Paula Behrens has agreed to join us.

Please tell us your group's plans for the upcoming year.

We will continue to meet twice a month to manage the day-to-day operations of USG.

Reparations Committee

Submitted by: Deborah Coleman

Members of Committee - indicate chair(s) and note upcoming changes

Deborah Coleman-Chair Vanessa Lowe Maurice Gaston - Co-Chair Andrea Barsevick Amy Birge-Caracappa Norman Matlock

Who will be the chair of this committee in the coming year?

Deborah Coleman & Maurice Gaston

Please offer a reflection on the work done by your team this year (7/2025- 6/2026). Include specifics such as major projects completed, milestones, challenges, initiatives, etc,.

After careful consideration and a vigorous vetting process, we decided to split the funding three ways: ~$98,000 to Germantown Residents for Economic Alternatives Together -GREAT (greatgtown.org) a non-profit local grass roots organization that directly supports the needs of the Germantown Community; and ~48,000 to Coded BY (codedby.org) a nonprofit in Philadelphia that empowers youth with coding, tech, and entrepreneurship skills through free educational programs. The remaining $4,000 plus whatever interest accumulates on the investment, has been set aside to place a memorial on the grounds of USG to the enslaved people whose free labor built the nations wealth and power, and which continues to benefit all of us today. The space is intended to be a place of reflection, gratitude, and healing.

Please tell us your group's plans for the upcoming year.

Four people from the original committee - Deborah, Maurice, and Amy plus architect Linda Ogwynn will be working on a draft design for the memorial which will be shared with the congregation in small groups to get input on the specifics of the structure. Members of the congregation who would like to contribute to the design and completion of the memorial are welcome to join the committee. We can be reached at reparations@usguu.org.

Membership & Welcoming Committee

Submitted by: Treva Burger

Members of Committee - indicate chair(s) and note upcoming changes

Rev. Hannah Capaldi, Treva Burger and Susan Rizack do the majority of the work of Welcoming and Membership at this point, there is not currently a Welcoming or a Membership Committee.

Who will be the chair of this committee in the coming year?

Rev. Hannah is functionally the chair of Membership, Susan Rizack of Welcoming. We are eager to add additional leaders to this very essential committee and are open to anyone who might be interested in helping us embody a practical and spiritual commitment to radical welcome

Please offer a reflection on the work done by your team this year (7/2025- 6/2026). Include specifics such as major projects completed, milestones, challenges, initiatives, etc,.

Membership separated from Welcoming, neither group is currently a committee with meetings. Rev. Hannah and Treva Burger are working on Membership which consists of keeping track of visitors and helping guide them toward membership with support from Director of Communications, Lynsey Augustus. A Newcomers Series was created to update the Path to Membership. It includes UU Theology with Rev. Hannah, Circle Worship with Zoë Johnston, USG History with the Archives Committee (Carolyn Cotton and Susan Bockius) and USG Building Tour with Paula Behrens. People are asked to attend 3 of 4 before they join, but they can also do them after they join. Each is offered roughly every other month. They have been very well received with many people who are members taking them as well. New Member Sundays now begin with Coffee, Conversation and Book Signing with Rev. Hannah which replaces Membership Orientation. It includes the signing of the membership book and gifts of a book, a USG mug, information about pledging and a new member bingo card which offers many ways people can deepen their connection with USG. And then there is a ceremony during the service to welcome them into the congregation. This occurs roughly October, February and June. We certified with the UUA at 263 members this February, up from 241 the year prior. Since February we have added 5 additional members. We had 22 new pledgers this year and currently have 48 Active Contributing Friends who pledge or contribute financially, but haven't officially joined by signing the Membership Book. Susan Rizack makes sure the Welcome Table is staffed and has implemented new accessibility and name tag processes. To date, Susan has staffed the Welcome Table 17 of the weeks, with another 10 folks staffing the other 23 (5 of them are Board members.) Persons with Disabilities (PwD) justice has been advanced with the launch of USG's first PwD Peer Support Group, now in its 9th month. We published USG's first PwD brochure that provides insightful facts and figures about the community as well as important accessibility at USG information. We have created 5 designated accessible seating spots in several locations throughout the pews with labelling and open or quick-convert

spaces. The former members of the Welcoming Team also continue to create and send a USG holiday card.

Please tell us your group's plans for the upcoming year.

We plan to add people to the Membership Team, to continue the Newcomers Series and New Member Sundays. The Welcome Table will continue to be staffed each Sunday, we will continue partnering with various contacts in the congregation to further advance PwD justice in the coming years and we plan to do a USG holiday card again.

Stewardship Committee

Submitted by: Rick Rodes

Members of Committee - indicate chair(s) and note upcoming changes

Rick Rodes, Sam Stormont, Jody Hill, Grace Bonds, Lyla Duey, Rev Hannah, Lynsey Augustus, Kate Sparacio

Who will be the chair of this committee in the coming year?

TBD

Please offer a reflection on the work done by your team this year (7/2025-6/2026). Include specifics such as major projects completed, milestones, challenges, initiatives, etc,.

Kicked off 2026-2027 pledge campaign on March 22, 2026. Goal $415,000.With major help from Lynsey August developed campaign theme (Woven Together in Love) and beautiful pledge brochure, mailed brochure and pledge forms-March 23, sent out waves of texts/emails/Communicator reminders, processed pledges and pledge results-thank you Eric Foster, conducted every other week STEW ZOOMS, sent thank you notes in timely manner. Results as of 6/6/26: $404,200

Please tell us your group's plans for the upcoming year.

Do the same as this year.

Worship Arts Committee

Submitted by: Maggie Birge-Caracappa

Members of Committee - indicate chair(s) and note upcoming changes

Maggie Birge-Caracappa (chair)

Who will be the chair of this committee in the coming year?

Maggie Birge-Caracappa

Please offer a reflection on the work done by your team this year (7/2025- 6/2026). Include specifics such as major projects completed, milestones, challenges, initiatives, etc,.

Our major initiative was to bring more personalization to the welcome statement, allowing each worship associate to write their own introduction paragraph while keeping the necessary information. This, coupled with the Testimony, has made the worship team a bigger partner in crafting the service. We have also made it a point to invite new people or visitors to the church to light our chalice as a way of ensuring everyone feels welcome and we are not seeing the same few people involved in the service.

Please tell us your group's plans for the upcoming year.

Some of our worship associates have decided to step down for the coming year. We are focused on trying to bring more people of color and more male-presenting individuals to the worship arts team.

Caring Committee

Submitted by: Linda Bernstein

Members of Committee - indicate chair(s) and note upcoming changes

Linda Bernstein, chair Rev. Hannah, Eileen Teti, Carolyn Scott

Who will be the chair of this committee in the coming year?

Linda Bernstein

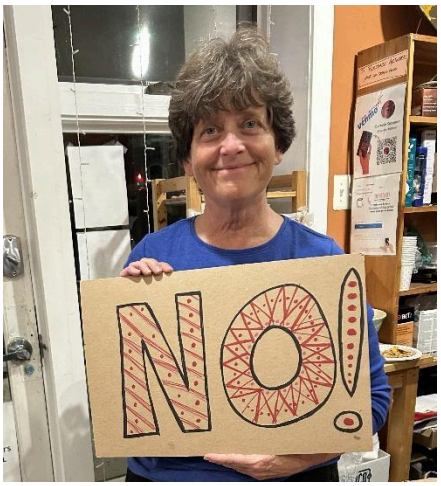
Please offer a reflection on the work done by your team this year (7/2025- 6/2026). Include specifics such as major projects completed, milestones, challenges, initiatives, etc,.

The activities of the Caring Committee further the part of the USG mission statement that calls on us to “build beloved community…” We solicit information about illness and loss, also births, graduations and other happy occasions. We publish these in the weekly Communicator and organize help as needed. This could be in the form of meals, rides or quiet comfort. USG has historically been very intentional with its Caring mission and this year was no exception.

Please tell us your group's plans for the upcoming year.

We plan to continue to cultivate a community where help is easily asked for and generously provided. Many members are more comfortable providing help than receiving help. Our beloved community is strengthened when we normalize both sides of the equation, both receiving as well as giving.

Board Candidates



Anne Bower *Three year term*
Anne (she/her) has been an active member of USG since 2006. She happily sings soprano in the choir, makes soups and salads to share with all, brings food for the food pantry and gladly facilitates a small group ministry. As a Professor of Biology & Herbal Medicine, she inspires curiosity and exploration of positive health journeys for undergraduate students. At the UU Mt Airy she wrote several successful grants and taught Our Whole Lives. She has depth of experience to share from 40+ years of community service including Peace Corps, Global Medical Brigades, Home at Last Dog Rescue and Schuylkill Center for Environmental Education.



Nick Semon *Three Year Term*
Nick (he/him) has been attending USG since 2018 and became a member in 2025. He runs a Small Group Ministry and serves as a Worship Associate. Nick is deeply interested in maintaining and using USG facilities to serve both the congregation and our broader community in ways large and small. Outside of USG, Nick's professional work centers on sustainability and carbon reduction in buildings. He has been involved with several nonprofits, including as a founding Vice President of the PA Green and Healthy School's Partnership. He is married to USG member Allie Semon, and together they have two kids, Ingrid (8) and Josie (11).



Sara Hertz *One Year Term*
Sara was appointed by the Board in December to complete the term of a Board member who needed to leave the Board early. Our Bylaws state she must be elected by the congregation at the next Annual Meeting.

Sara has more than 35 years of experience leading development and operational strategies for local, national, and global nonprofits. She has secured transformational gifts, built sustainable fundraising programs, and

strengthened board and governance practices. She currently serves as Director of Major Gifts for the African Wildlife Foundation. Sara began her career at Gay Men's Health Crisis in New York and later worked in the U.K., where she helped launch the World Wildlife Fund's first major gifts program. In the Philadelphia region, she has held leadership roles with the Nature Conservancy, Academy of Natural Sciences, Conservation International, Philabundance, the Philadelphia Zoo, and the University of Pennsylvania. As a consultant, she has supported major campaigns and provided strategic development leadership for organizations including the Tree of Life campus project, Children's Literacy Initiative, Jewish Relief Agency, Wissahickon Trails, and others. An active civic volunteer, Sara has served on Ambler Borough Council, co-founded the Ambler Farmers' Market, and held board and committee roles with multiple regional nonprofits. She has two adult sons and lives in Ambler with her wife, Lee. She is a graduate of the University of Pennsylvania.

Nominating Committee Candidates



Andrea Barsevick *One Year Term*
Andrea (she/her) is a worship associate at USG & previously served on many committees including the USG Board of Trustees. She has been a member of the Unitarian Society of Germantown since 1986 and she and her husband Rudy Sprinkle raised their two children in this church. She is a retired nurse who served on the faculty of Thomas Jefferson University, Fox Chase Cancer Center, & Penn, making contributions in cancer care, research and education.



Devery Howerton *Three Year Term*
Devery (she/her) joined USG in 2017, soon after moving to Philadelphia. She has served on several committees and groups including the Social Justice Council, the MLK Day planning team, Board of Trustees, Small Group Ministry, and the COVID Moving Ahead Steering Committee. She is currently a member of the USG Finance Committee and chairs

the UUJusticePA Reproductive Justice Team. She lives in Mt. Airy with her dog Ziggy and enjoys gardening, yoga, cooking, and playing mahjongg.



Megan Moser *Three Year Term*

Megan (she/her) officially joined USG as a member in May 2025, she started coming as a visitor in 2023. Raised in a conservative evangelical Christian tradition, she was looking for an open-minded, diverse and supportive community committed to spiritual growth, and is thrilled to have found a home at USG. Megan currently serves as a mentor in the Coming of Age program and participates in Small Group Ministry and the GenXYZ group. Megan lives in East Falls and is the proud parent of a recent college graduate, and two adorable rescue cats. In her free time, she enjoys swimming, traveling anywhere (near or far), and spending time with family and friends.

USG budget for FY26-27

	CURRENT	NEXT YEAR
	Budget 25-26	**Budget 26-27**
REVENUE		
4000 PLEDGES/GIFTS/GRANTS		
4001 PLEDGES & CONTRIBUTIONS	404,000	404,000
4002 SPECIAL GIFTS	30,000	35,000
4005 MISC GIFTS	0	
4007 SHARE THE PLATE	38,000	39,000
4008 SURPLUS TRANSFER	20,640	4,500
Total 4000 PLEDGES/GIFTS/GRANTS	**$492,640**	**$482,500**
4010 FUNDRAISING/PROGRAM INCOME		
4011 MLK FUND RAISING	3,000	0
4012 SERVICE AUCTION	14,000	12,000
4014 END OF YEAR APPEAL	12,000	12,000
4015 FELLOWSHIP HOUR INCOME		4,800
4100 CHILD SPIRITUAL DEVELOPMENT	1,500	3,300
4300 ADULT SPIRITUAL DEVELOPMENT	1,500	2,400
Total 4010 FUNDRAISING/PROGRAM INCOME	**$32,000**	**$34,500**
4600 RENTAL INCOME		
4601 CO-OP NURSERY	25,752	26,396
4602 APARTMENT	15,000	15,000
4604 MISC. RENTALS & RENTAL CHARGES	32,000	43,000
Total 4600 RENTAL INCOME	**$72,752**	**$84,396**
4800 CIF FUND REVENUES		
4801 YEARLY WITHDRAW FROM CIF	31,031	30,500
4804 MUSIC MAINT. YEARLY WITHDRAW FROM CIF	2,000	0
Total 4800 CIF FUND REVENUES	**$33,031**	**$30,500**
Total Revenue	**$630,423**	**$631,896**
EXPENDITURES		
5002 MINISTER COMPENSATION		
5002.01 MINISTER SALARY	69,728	73,214
5002.02 MINISTER HOUSING	32,772	34,411
5002.04 MINISTER DISABILITY INSURANCE	1,332	
5002.05 MINISTER PENSION	10,250	10,762
5002.06 MINISTER FICA	7,841	8,233
Total 5002 MINISTER COMPENSATION	**$121,923**	**$126,620**
5004 DSD COMPENSATION		
5004.01 DSD SALARY	56,000	58,240
5004.03 DSD MEDICAL INSURANCE	0	9,156
5004.05 DSD PENSION	5,133	5,824
5004.06 DSD EMPLOYER P/R TAXES	4,284	4,455

Total 5004 DSD COMPENSATION	**$65,417**	**$77,675**
5006 CHURCH ADMIN COMPENSATION		
5006.01 CHURCH ADMIN SALARY	62,000	62,500
5006.03 CHURCH ADMIN MEDICAL INSURANCE		9,156
5006.05 CHURCH ADMIN RETIREMENT/PENSION	5,683	1,563
5006.06 CHURCH ADMIN EMPLOYER P/R TAXES	4,743	4,781
Total 5006 CHURCH ADMIN COMPENSATION	**$72,426**	**$78,000**
5008 MUSIC DIRECTOR COMPENSATION		
5008.01 MUSIC DIRECTOR SALARY	23,575	25,000
5008.05 MUSIC DIRECTOR RETIREMENT/PENSION	2,358	2,500
5008.06 MUSIC DIRECTOR EMPLOYER P/R TAXES	1,803	1,913
Total 5008 MUSIC DIRECTOR COMPENSATION	**$27,736**	**$29,413**
5010 SEXTON COMPENSATION		
5010.01 SEXTON SALARY	34,000	44,000
5010.05 SEXTON PENSION	3,400	4,400
5010.06 SEXTON EMPLOYER P/R TAXES	2,601	3,366
Total 5010 SEXTON COMPENSATION	**$40,001**	**$51,766**
5012 DIRECTOR OF COMMS COMPENSATION		
5012.01 DIRECTOR OF COMMS SALARY	25,000	26,000
5012.06 DIRECTOR OF COMMS EMPLOYER P/R TAXES	1,913	1,989
Total 5012 DIRECTOR OF COMMS COMPENSATION	**$26,913**	**$27,989**
5014 CHILDCARE PROVIDERS COMPENSATION		
5014.01 CHILDCARE PROVIDERS SALARY	6,000	6,000
5014.06 CHILDCARE PROVIDERS EMPLOYER P/R TX	459	459
Total 5014 CHILDCARE PROVIDERS COMPENSATION	**$6,459**	**$6,459**
5020 TECH/AV COMPENSATION		
5020.01 TECH/AV SALARY	5,200	6,500
5020.06 TECH/AV EMPLOYER P/R TAXES	398	497
Total 5020 TECH/AV COMPENSATION	**$5,598**	**$6,997**
5050 INDEPENDENT CONTRACTOR - COMPENSATION		
5054 SPEAKERS	3,150	3,150
5056 MUSIC MINISTRY	8,500	10,000
5058 RENTAL COMMISSIONS	6,400	8,600
5060 ACCOUNTING SERVICES	3,000	3,000
5066 CLEANING SERVICES	26,000	0
Total 5050 INDEPENDENT CONTRACTOR - COMPENSATION	**$47,050**	**$24,750**
Total 5000 TOTAL COMPENSATION	**$413,523**	**$429,669**
5025 PROFESSIONAL EXPENSES		
5025.01 MINISTER PROFESSIONAL EXPENSES	7,000	7,000
5025.02 DSD PROFESSIONAL EXPENSE	2,500	3,000
5025.03 CHURCH ADMIN PROFESSIONAL EXPENSES	600	600
5025.04 MUSIC DIRECTOR PROF EXPENSES	3,000	3,500
5025.05 DIRECTOR OF COMMS PROFESSIONAL EXPENSES	300	400
Total 5025 PROFESSIONAL EXPENSES	**$13,400**	**$14,500**

6000 PROGRAM EXPENSES		
6100 FUNDRAISING CAMPAIGNS		
6110 STEWARDSHIP CAMPAIGN	200	0
6120 SERVICE AUCTION	700	500
Total 6100 FUNDRAISING CAMPAIGNS	**$900**	**$500**
6200 WELCOMING		
6210 HOSPITALITY	13,000	18,000
6220 CARING COMMUNITY	100	600
6230 WELCOMING COMMUNITY	600	1,000
Total 6200 WELCOMING	**$13,700**	**$19,600**
6300 SPIRITUAL DEVELOPMENT		
6310 CHILD SPIRITUAL DEVELOPMENT	$3,700	5,000
6320 ADULT SPIRITUAL DEVELOPMENT	1,830	2,400
Total 6300 SPIRITUAL DEVELOPMENT	**$5,530**	**$7,400**
6400 SOCIAL JUSTICE		
6410 SOCIAL ACTION EVENTS		
6420 POWER	300	300
6440 ENDING RACISM	3,500	1,200
6450 ANTI-OPPRESSION		2,000
6470 SHARE THE PLATE	19,000	19,500
6480 DENOM AFFAIRS/GA SUBSIDIES	3,100	2,500
Total 6400 SOCIAL JUSTICE	**$25,900**	**$25,500**
6900 WORSHIP ARTS		
6910 SHEET MUSIC EXPENSE	1,000	1,000
6920 PIANO/ORGAN MAINT	1,000	
6930 SUNDAY SERVICES SUPPLIES	400	400
Total 6900 WORSHIP ARTS	**$2,400**	**$1,400**
Total 6000 PROGRAM EXPENSES	**$48,430**	**$54,400**
7000 CHURCH OPERATING EXPENSES		
7003 UTILITIES		
7003.01 ELECTRIC CHURCH	6,930	7,970
7003.03 OIL/GAS CHURCH	11,000	12,320
7003.05 WATER-CHURCH & LODGE	7,500	8,025
Total 7003 UTILITIES	**$25,430**	**$28,315**
7004 BUILDING MAIN/OPER/REPAIR		
7004.01 FIRE/SECURITY SYSTEM	5,000	1,500
7004.02 GROUNDS	400	2,500
7004.03 SNOW & ICE REMOVAL	11,200	11,200
7004.04 ELEVATOR	5,775	5,948
7004.05 EQUIPMENT	1,260	1,000
7004.06 HEATING, COOLING & MAINT CONTRACTS	4,800	2,500
7004.07 MAIN/REPAIRS CHURCH	22,000	14,000
7004.08 MAIN/REPAIRS LODGE	3,200	2,500
7004.09 ROOF	7,500	2,500

7004.11 PARKING LOT		1,200
Total 7004 BUILDING MAIN/OPER/REPAIR	**$61,135**	**$44,848**
7250 ADMINISTRATIVE/OPERATING EXPENSE		
7250.01 PUBLICITY/ADVERTISING	330	100
7250.02 WEBSITE	4,000	0
7250.04 CREDIT/ACH FEES	2,300	2,300
7250.05 BOARD EXPENSE		0
7250.07 MAILINGS (GENERAL)	150	150
7250.08 OFFICE SUPPLIES	700	700
7250.09 PHONE AND INTERNET	4,000	3,000
7250.11 EQUIPMENT/REPAIR/MAINTENANCE	300	1,000
7250.12 BANK CHARGE	200	200
7250.13 COMPUTER SOFTWARE	3,500	3,500
7250.15 COPIER EXPENSE	1,000	500
7250.16 PROPERTY & LIABILITY INSURANCE	26,000	26,795
7250.17 WORKERS COMP	1,424	1,424
7250.18 HOUSEKEEPING SUPPLIES	1,200	3,500
Total 7250 ADMINISTRATIVE/OPERATING EXPENSE	**$45,104**	**$43,169**
7500 DENOMINATIONAL DUES	18,000	17,000
Total 7000 CHURCH OPERATING EXPENSES	**$149,669**	**$133,332**
Total Expenditures	**$625,022**	**$631,901**
Net Revenue	**$5,401**	**($5)**

Minutes of the Unitarian Society of Germantown Annual Meeting

June 1, 2025

Welcome
Board President Carla Campbell called the meeting to order at 12:20 p.m. and welcomed those in attendance.

Appointment of the Moderator and Secretary of the Annual Meeting
Paul Teti was appointed moderator and Devery Howerton as secretary for the meeting.

Approval of the minutes of the 2024 Annual Meeting
The 2024 meeting minutes were displayed on the screen, a date correction was made, and the minutes were approved.

Board of Trustees Annual Report
Carla Campbell presented the Board of Trustees report. The Board welcomed our new minister, Rev. Hanah Capaldi, and worked to support her ministry They held a Board retreat in the fall, launched a new Finance Committee and Denominational Affairs Committee, and the Mission Review Steering Committee, which will become active later this year. In March, the Board facilitated a special election for General Assembly (GA) delegates. Other activities and accomplishments included participation in the ministerial review process, reviewing and updating policies, supporting the involvement of children and families with periodic reports from the Director for Spiritual Development, and working to create a climate of growth for membership and member retention. Specific goals for the upcoming year will be developed during a fall Board retreat, but will include continuing work on reviewing and updating policies, a review of community relationships, and addressing Widening the Circle recommendations.

Widening the Circle recommendations addressed this past year include the following. -

1. Anti-Racism, anti-oppression, and multicultural (AR/AO/MC) training: A concert and service is planned for Sept 21 and 22, 2025 with the Deeper Than Skin group and the Board is exploring the UUA Mosaic platform as a potential initiative for USG.
2. Create a budget for funding for AR/AO/MC training – This is now a line item in the budget.
3. Make funding available for GA delegates – Funds for GA are now a line item in the budget and will be a Share The Plate donation.
4. Provide seminary support – Share The Plate will be offered once/year for this purpose.

Ministry Executive Team & Minister Report
Rev. Hannah Capaldi expressed gratitude to the congregation for making her feel like this is homecoming for her and for everyone being open to changes. She worked to be available to

congregants, as needed, for communicating about the various changes during this time of transition. She said it's been a wild ride! She thanked the staff for their hard work during this turbulent year of transition and growth. We had an historically successful pledge campaign this year surpassing our goal to reach $425,000 with $34,000 in new pledges. Her goals include continuing to provide excellent worship and to develop new mission and vision statements that are simpler and more in line with where we are now. She said it is important that we look at how we knit ourselves together as we are growing so rapidly, keep from a forming a schism between old and new. The implementation of lunches after Sunday services has helped with that. She will be working on how to grow visitors into members and then into leaders, a form of succession planning. In summary, her primary goals are worship, mission and vision, and continuity between older and newer generations.

Report of Adult and Children's Spiritual Development Programs

Director of Spiritual Development (DSD) Zoe Johnston reported that the Children's Spiritual Development Program (CSD) tripled in size this year. Her goals when she started in August were 1. Get to know the kids, an amazing group of young people, 2. Build relationships with volunteers and find a way to provide more support, especially for volunteers who maintained the program during the summer before she came on board, and 3. Build an infrastructure that includes a monthly newsletter, weekly emails, and other tools to make it easier for volunteers. She hired Illi Germain in January as CSD Assistant to better serve the growing needs of the expanding CSD program.

Regarding Adult Spiritual Development (ASD), she reported that most of her 30 hours/week were focused on CSD and praised the lay leaders who maintained programs such as the Feminist Theology Group and Ending Racism Committee. She will be working full time next year and will be able to better discern what ASD needs. She plans to collaborate with the ASD Committee to develop a multifaceted, holistic program with the purpose of helping adults to develop a clear understanding of UU theology.

Financial Report

USG Treasurer Phillip Bullard presented the financial report for this year, noting that as of May 31, 2025, of the $342,410 pledged, the fulfillment rate is 88% so far and expects it will reach 95% or more by the end of the fiscal year. He presented a graphic of the pledging campaigns for past 8 years and the status of the current year's budget as of May 31. He noted that the Common Investment Fund (CIF) totals about $1.2 million, with the General Endowment (GE) decreasing slightly. He said we are now taking steps to maintain GE sustainability which include 1. assessing a small fee from each of the other funds for the GE, 2. keeping most of the funds in ESG investments, while moving about 20% of the funds into equities with better performance, and 3. working to reduce the annual draw from the GE for operations over time. When asked if we have a balanced budget, he stated that we do have a balanced budget, but it includes a

distribution from the GE. When asked why Sullivan fund decreased significantly, he said that about 60% of the Sullivan Fund is now in the Reparations Fund. It was noted that the Edna Jones fund for building maintenance is currently at about $22,000 and continuing to decrease; we will need to use other funds to cover building maintenance in the future.

2025-2026 Budget Report

When presenting the budget projections for next year, Phillip Bullard announced that pledges, gifts and grants have increased about $100,000 over last year's budget, an historic high for USG. The total revenue is projected to be about $630,000. We are excited to be able to increase staff compensation to come closer to UUA guidance. When asked why there is a projected increase in rental income, it was noted that we have consistently exceeded what was projected, will be hiring a new building manager, and plan to do more marketing for rentals in the next year, all of which may increase rental use, while also increasing rents to be more in line with the market. When asked about increases in compensation, some of the increases are due to moving the DSD from part time to full time, proportionally increasing to fair compensation, and increasing professional expenses for the Music Director. Rev Hannah reported that USG pays a minimum wage of $20/hour for hourly employees.

The members present voted and approved the budget for next year.

Q & A

Where does reparations money go? Deborah Coleman, Reparations Committee Co-Chair, explained that the committee is in the process of deciding where the funds will go. Updates are available on line.

Presentation of Awards

- Under Five Years, or "Hit the Ground Running" award was presented to Deborah Coleman by Carla Campbell.
- Congregational award was presented to Jody Hill by Paul Teti.
- Lifetime Achievement award was presented to Carolyn Scott by Carla Campbell and to Carolyn Cotton by Paul Teti.

Election of Board Officers and Nominating Committee Members

Ballots were distributed. Members for at least three months were eligible to vote.

Closing Words

Rev. Hannah Capaldi provided closing words, saying "take heart, take pride, and know you are loved."

The meeting adjourned at 1:30 pm.