



FISCAL YEAR 2026 REPORTS
FOR THE 75th ANNUAL MEETING

THE UNITARIAN UNIVERSALIST
CONGREGATION IN WESTPORT

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The 75th Annual Meeting Agenda

SUNDAY, JUNE 14, 2026, in the Sanctuary, 11:30 a.m.

Opening & Minutes Approvals

- Call to Order (B Cliff, Board President and Moderator)
- Opening Words and Chalice Lighting (M-C Bue and K Roberts, Pastoral Care Associates)
- A Covenant Perspective (D Carreau, Committee on Ministries, "COM")
- Quorum Report (F Keeton, Board Secretary)

Approval of Member Meeting Minutes (B Cliff)

- June 08, 2025: Annual Member Meeting
- October 05, 2025: Special Member Meeting to Amend Constitution

The Very Fine Lifetime Volunteer Service Award (D Brownstein, Trustee)

Sharing 2025-26 Reports

- Transition Ministry (Rev Carlton E Smith)
- Minister Search (E Rockman-Blake, Settled and Contract Minister Searches)
- Board of Trustees (B Cliff)
- Committee on Ministries (S Dumery, incoming COM Chair)
- Social Justice Council and Vote on Future Share-the-Plate Recipients (L Cenci, SJC Co-Chair)
- #MeToo Resolution (B Cliff)
- Anti-Racism Resolution (B Cliff)

Constitutional Amendments (J Norman, Trustee)

- **MOTION 1:** Revise Article VIII: Board of Trustees, Section 2. Composition, to reduce the size of the Board from nine members to seven.
- **MOTION 2:** Revise Article X: Elected Committees of the Congregation, Section 5 to reduce the size of a Settled Search Team from nine members to between five and seven.

Financial Reports and Proposed 2026-27 Budget

- Endowment Report (K Vogel, Endowment Chair)
- 2025-26 Pledge Report (S Somashekar, Stewardship Co-Chair)
- 2025-26 Financial Results (J Gage, Treasurer, Finance Chair, Trustee)
- Proposed 2026-27 Budget (J Gage)

MOTION: To ratify the 2026-2027 budget (J Gage)

New Committee Members and Installation

- Nominees for our Elected Committees (L Hennessy, Nominating Committee Co-Chair)
 - Board of Trustees
 - Endowment Committee
 - Committee on Ministries
 - Nominating Committee
- Installation of New Board & Elected Committee Members (B Cliff)

Appreciation and Gratitude

- Ken Vogel (F Keeton)
- Sue O'Meara (B Cliff)
- Rev. Carlton E. Smith (B Cliff and Trustees)

New Business

Adjournment

BOARD and ELECTED COMMITTEES ROSTER - 2025-2026

Terms of Elected Offices as of June 8, 2025

BOARD OF TRUSTEES – 9 members, elected to 3-year terms, in a 3-3-3 rotation. Max of 2 consecutive terms.

Terms ending June 2026:

Beth Cliff	2026	(President)
Ravi Sankar	2026	(Vice President)
Alexa Marshall	2026	

Terms ending June 2027:

Mark Corcoran	2027	
Jon Gage	2027	(Treasurer)
Felicia Keeton	2027	(Secretary)

Terms ending June 2028:

Dayle Brownstein	2028	
Julyen Norman	2028	
Sari Bodi	2028	

COMMITTEE ON MINISTRIES (COM) – 7 members, elected to a single 3-year term, 1 or 2 vacant slots each year

Melanie Allen	2026	
Shahan Islam	2026	
Naree Viner	2027	
Denise Carreau	2027	
Sofia Dumery	2027	
Christine Updegraff	2028	
Gian Morresi	2028	

ENDOWMENT COMMITTEE – 5 members, single 5-year term, 1 elected each year

Cindy Potter	2026	
Tom Hearne	2027	
Ken Vogel	2028	(Chair)
Terri Laug	2029	
Steve Grathwohl	2030	

NOMINATING COMMITTEE – 5 members, single 2-year term, 2 or 3 elected in 2-year rotation

Melissa Balmer	2026	
Lindy Hennessy	2026	
Eileen O'Reilly	2026	
Jim Cooper	2027	
Nancy McKeever	2027	

ELECTED COMMITTEES NOMINATING SLATE - 2026-2027

Terms of Elected Offices to be voted on June 14, 2026

This year we have the opportunity to vote in ten new elected officers: 3 Trustees, 2 COM members, 2 Endowment Committee members, and 3 Nominating Committee members as follows:

BOARD OF TRUSTEES – 9 members, elected to 3-year terms, in a 3-3-3 rotation. Max of 2 consecutive terms.

Terms ending June 2027:

Mark Corcoran	2027
Jon Gage	2027
Felicia Keeton	2027

Terms ending June 2028:

Dayle Brownstein	2028
Julyen Norman	2028
Sari Bodi	2028

Terms ending June 2029:

Alison Smith	2029	Nominee for Election June 2026, 1st term
Ben Chan	2029	Nominee for Election June 2026, 1st term
Elena Rockman-Blake	2029	Nominee for Election June 2026, 1st term

COMMITTEE ON MINISTRIES (COM) – 7 members, elected to a single 3-year term, 1 or 2 vacant slots each year

Naree Viner	2027	
Denise Carreau	2027	
Sofia Dumery	2027	
Christine Updegraff	2028	
Gian Morresi	2028	
Steven Rosenberg	2029	Nominee for Election June 2026
Teryl Eisenberg	2029	Nominee for Election June 2026

ENDOWMENT COMMITTEE – 5 members, single 5-year term, 1 elected each year

Tom Hearne	2027	
Ken Vogel	2028	(Chair)
Terri Laug	2029	
Steve Grathwohl	2030	Nominee for Election June 2025
Chuck Colletti	2031	Nominee for Election June 2026

NOMINATING COMMITTEE – 5 members, single 2-year term, 2 or 3 elected in 2-year rotation

Jim Cooper	2027	
Nancy McKeever	2027	
Anita Pfluger	2028	Nominee for Election June 2026
Sean Feuer	2028	Nominee for Election June 2026
Kate Croarkin	2028	Nominee for Election June 2026

STAFF ROSTER

Rev. Carlton E. Smith, Transitional Senior Minister
Micah Krajca, Director of Music
Angi Haen, Director of Faith Formation
Rev. Jim Francek, Community Minister - Pastoral Care
Rev. Dr. Edward Thompson, Minister of Music Emeritus
Rev. Frank Hall, Minister Emeritus, deceased March 17, 2026
Nick Barra, Assistant Director of Music
Sue O'Meara, Accountant
Ruth Fontilla, Congregational Administrator
Marcus Charles, Nursery Attendant
Mike Roman, Part-Time Custodian

Transitional Senior Minister

It seems unreal that it's been ten months since my tenure began here with you at UUWestport. In some ways, the time has passed very quickly, and in others, it feels as if I've been here much longer.

What a congregational year it has been! There are other reports that follow which delve into greater detail than would seem appropriate in mine, so I will paint in broad strokes.

On Ingathering Sunday, we were still meeting in the foyer, anxiously awaiting the return to our Sanctuary, yet finding a way to still be in community.

In the winter, we gratefully received news of the \$802,000 bequest from the estate of Nancy Treadwell, whose parents were among those who mortgaged their homes so that we could have our extraordinary building here on Lyons Plains Road.

Over the course of the year, we said farewell to beloved members, including Minister Emeritus Rev. Frank A. Hall. Because of a generous contribution from his family, we now have The Rev. Frank A. Hall Preservation Fund, dedicated to the sustaining of UUWestport's buildings and grounds.

We faced the challenge of not finding a match in the Settled Minister Search process, though the Senior Minister Search Committee served with great diligence.

We experienced successes in our fundraising efforts, including the online auctions, the Art Show, the Holiday Appeal, and the annual pledge drive. Because of your creativity, dedication, and generosity, we have been able to express our commitment to retaining staff through appropriate increases in their compensation and benefits. We will also enter the 2027 fiscal year with more reserves for the unexpected expenses that arise in congregational life.

This spring, after 14 faithful years as an employee here, Sue O'Meara transitioned from staff Accountant to the role of independent contractor supporting UUWestport's accounting needs. She's on campus once a week and working primarily from her home office. We are grateful that at this time of transition, Sue is able to continue on as an integral part of the congregation's financial well-being.

I know that for whatever I was able to contribute during my time with you, the support and faithfulness of the core staff is woven all throughout it. Thank you, Nick Barra, Marcus Charles, Ruth Fontilla, Rev. Jim Francek, Angi Haen, Micah Krajca, and Sue O'Meara – It's been a joy collaborating with you to bring the values of Unitarian Universalism alive week after week.

In that same vein, I can't overstate the countless ways members and friends have given of themselves to ensure that UUWestport is strong and vibrant as a congregation.

I am excited for the next years the congregation will have with Rev. Terri Dennehy as its Senior Minister. Prayerfully, and with your support and encouragement, she will be able to guide the congregation deeper into fulfilling its promises to itself and to the many communities that can and will benefit from its partnership in service of our highest values.

Here are a few things I hope you will be mindful of in the year ahead:

Decision-Making: We can be grateful for the progress that has been made with the Decision-Making Matrix. It's also the case that who has the final say in many aspects of the life of the congregation is still contentious. Who ultimately gets to determine whether a matter rises to the level of being a major consideration, requiring a congregational vote, for example? This is a difficult question to answer, especially in a community as egalitarian and as UUWestport, and with so many dynamic, well-intentioned leaders!

Treadwell Bequest Discernment: While it is a blessing to have received such a substantial gift and to have a Board-appointed team to recommend a process around it, there are challenges that come with such gifts. There probably are as many distinct ideas of how those funds should be spent or invested as there are members and friends of the congregation. I believe UUWestport has an opportunity to learn from the controversies of its past and to do things differently. I would humbly offer that in order to avoid entering into a battle of wills, that the congregation slow down and consider the spiritual/ethical dimensions of what it has received. Knowing that there may be dissatisfied and unhappy people no matter how thoughtful the Treadwell discernment process is, how will each of you move through it with grace and care for the whole community? What are alternatives to our typical binaries of "up/down, win/lose" that could yield a more mutually supportive outcome?

Dynamics of Power: Who has power, and how is it used? How can the collective power of the congregation be leveraged for the benefit of the communities it serves? How can members and friends be further empowered to contribute meaningfully to the work of UUWestport as a whole?

Each week over these past months, I designated a time on my weekly calendar to write thank-you notes. In addition to generosity, I count gratitude as one of my core spiritual practices. It turned out to be a rather hit-or-miss commitment. Sometimes I was successful, and other times there were pastoral visits to make, meetings to attend, communications to write, phone calls to make, and other pressing tasks.

For that reason, I endeavored to practice gratitude daily, and from moment-to-moment. To each and everyone of you, whether I got around to writing a thank-you note or not for the wonderful contributions of time, talent, and treasure you have made to UUWestport, please know that I am so thankful for your generosity of heart, your patience, and your understanding.

Being with you this year has been an exciting adventure in my career. Thank you so much for your trust and encouragement! I love you very much.

Wishing you every blessing,
Rev. Carlton E. Smith

Director of Music

The Unitarian Universalist Congregation in Westport Music Program continued to deepen its role within congregational life this year. In addition to supporting worship, the program encouraged intergenerational relationships, creative expression, and broader involvement across the community.

Two music retreats centered on musicianship, relationship building, and repertoire development helped strengthen ensemble cohesion and support continued artistic development across the choirs. One retreat

featured collaboration with Vince Peterson, whose work with singers deepened both ensemble artistry and overall musicianship.

Collaboration with worship leaders remained central throughout the year. Music selections supported the themes of the Soul Matters Sharing Circle while remaining responsive to the needs of individual services and seasonal events. The choirs also embraced their renewed identities as Mosaic Voices, Radiant Light, and Ignite, bringing renewed energy and a stronger sense of ownership to each ensemble.

A continued commitment to musical diversity shaped this year's repertoire. Music by underrepresented composers was intentionally highlighted, while programming drew from a wide range of traditions, cultures, languages, and historical periods. Through intentional use of Sing Out Love, the congregation was introduced to new hymns that expanded musical vocabulary and encouraged more confident congregational singing. Services incorporated traditional choral literature, gospel, jazz, folk traditions, early music, contemporary repertoire, and call-and-response experiences.

The music program also expanded the congregation's artistic and cultural presence through partnerships, special events, and creative programming. These collaborations brought fresh perspectives into worship and strengthened the congregation's visibility within the broader community. Partnerships included American Modern Opera Company and The Glass House. The program also hosted the Songs of Spirit and Freedom concert with the Sacred Hoop Ministry.

Under Nick Barra's leadership, the Bell Choir continued providing steady musical support throughout the year.

Intergenerational involvement remained a major focus of the program. Children, youth, adults, and older members of the congregation regularly participated side by side in services and musical events, including multigenerational worship, the cabaret, the winter singalong, the Nativity Pageant, and special music Sundays.

Ignite, the youth choir, continued growing in both visibility and membership. Young singers were given opportunities for leadership, creativity, and skill building through regular participation in services and special events.

Choir members demonstrated increased confidence in vocal technique, music literacy, collaboration, and ensemble skills. Fellowship and relationship building also remained important parts of choir life through shared meals, gatherings, coffee hour support, and participation in the Listening Project. Approximately twenty hours were devoted to hearing the stories and experiences of congregation members through this initiative.

Beyond rehearsals and weekly services, the music program remained closely woven into many areas of congregational life. Choir members offered reflections, participated in Time for All Ages, and supported special services throughout the year. The music program helped lead the congregation's Trans and Nonbinary Celebration Sunday in collaboration with Rev. Carlton Smith and worship leaders. Additional opportunities for soloists, instrumentalists, and small ensembles helped expand access and encourage continued musical participation. Guitar lessons, informal mentorship, and individualized practice tracks also provided additional support for singers and newer musicians.

As the program continues to evolve, so does its role within the broader life of the congregation. In addition to preparing music for worship, the work increasingly includes coordination across ministries, volunteer leadership, intergenerational programming, and support for a growing number of creative and community-centered initiatives.

At its core, the music program helps create spaces where people feel seen, welcomed, and connected. Through music, storytelling, and shared experiences across generations, the program continues to nurture creativity, belonging, and a deeper sense of community.

Micah Krajca, Director of Music

Director of Faith Formation

Faith Formation Programming ("FF") will use the UUWestport Vision Statement as the framework for this annual report. The Vision Statement has seven topics: Community, Diversity, Leadership, Spirituality, Education, Stewardship, and Outreach.

- I. **Community:** FF currently serves 33 families — any family that has meaningfully engaged with the program. Of those, 20 are registered. Sunday classes have averaged around 24 children, with a high of 32 on Cornbread Communion Sunday. Here is who we serve:
 - Nursery: 9 children
 - K–3rd grade: 13 children
 - 4th–5th grade: 6 children
 - 6th–8th grade: 9 children
 - 9th–12th grade: 12 children

That is 49 children touched by UU Westport this year. And the community is literally growing: three babies are expected this summer!

- II. **Diversity:** The Vision Statement calls us to be a welcoming, multigenerational community — meaning FF must be a program for whole families, not only children and teens. Our "What Do You Need?" Project revealed that families are overwhelmingly busy, parents want space for their own spirituality, and volunteerism can become overwhelming. Listening led directly to new programs, including Multigenerational Show-and-Tell, Movie Night, Chalice Lighting in the Nursery, The Postcard Project, and a Walk & Picnic at Chuant Yen Monastery. We recognize that diversity is a place for growth. We must also strive to reach families of different backgrounds, economic statuses, and skin colors.
- III. **Leadership:** The FF Committee and volunteer teachers model leadership for the congregation. We are also watching FF parents step into broader leadership roles — a sign this community builds leaders at every stage of life. Youth Group has been a place of growth; we've learned that teens need something concrete to rally around. The annual trip has generated the most energy and may be the ideal vessel for developing leadership skills.
- IV. **Spirituality:** The deepest learning happens through story, example, and practice. Crossing Paths invited a Wiccan group to lead a Samhain ceremony, and the Washing of the Tears ceremony used water and wind to move something deep in participants of every age — moments when generations learn *with* each other.
- V. **Education:** FF continues to evolve its religious education offerings. New curricula this year include Stuffie Services (lower elementary, created by Angi), Journeys of Deeper Joy (middle school, UUA), and the JETPIG curriculum (K–5th, created by a colleague of Angi's). Children across groups report feeling engaged and curious, though Angi notes the new programs need some refinement in facilitator preparation. Returning favorites — OWL (4th & 5th) and Crossing Paths — continue as well.
- VI. **Stewardship:** Young families are not going to save our congregation financially — many cannot give significant financial support, and most lack bandwidth for committee work. That is not a failure; it is the reality of their season of life. Young families are an investment in the future, and how we cultivate that investment matters enormously. It will be gradual, but powerful.

Outreach: Much of our social outreach has centered on the John Street Social Justice Program, engaging our Youth Group, FF Fuun events where children pack lunches, and Giving Tree holiday gift initiative. Our Youth Group also volunteered with FORA in Chicago. When a child fills a bag with sandwiches for a neighbor they'll never meet, or a teenager volunteers across the country, something shifts in them. They begin to understand what it means to live out their values.

In Conclusion: The FF Committee asks you to look around at our vibrant program — families who know they belong, and children and youth learning that their questions, voices, and spirits matter. Vibrancy is measured not only in attendance or dollars, but in belonging, growth, and impact over time.

Submitted by Angi Haen

ELECTED COMMITTEES

Board of Trustees (BOT)

Our Constitution stipulates that "*The Board is responsible for ensuring the Congregation is financially healthy, well governed and achieving its mission.*" With that in mind, we are pleased to report to the Congregation that we are in a great place at the close of this year. We are at a new positive turning point in our financial position; we've made great strides in clarifying how we work together and govern ourselves; and we continue to set ourselves up to deliver against our mission: inspiring individual spiritual growth, connecting with others, and acting in the spirit of peace and justice.

All this was done in a sparkling, renovated sanctuary which reopened in September. The renovation was a culmination of many years of planning, hard work and generous member contributions, starting back nearly fifteen years ago, and continuing on through the 2019 Capital Campaign, with additional fundraising in 2024 and work completed this summer. A major achievement for all of us, and a significant gift to the UU Westporters who will congregate here for years to come. This Board was honored to see the project through to completion, and thanks so many who made this dream come true for us all.

This year, the Board had as an overarching goal to settle things down within our community, after an emotional couple of years. During this time, many had been affected and impassioned about large issues that were decisions we would be living with for a long time: changing our name, whether to install an organ, and renovating the sanctuary. And while dealing with these issues, the congregation was also navigating three separate minister searches in a challenging supply/demand situation, and we had three different ministers leading us in four years. That's a lot of change for any congregation and board to absorb. Yet we all have come through this time pretty well. We've learned from our experiences and made changes to how we do things. We are moving forward - closer knit as a community - with remarkably positive momentum. The future beckons, brightly.

The '25-26 Board had three strategic areas of focus, even as it dealt with ancillary issues as they arose. First, the Board established our priority ends¹; second, it supported Rev. Carlton, the staff, and the congregation as collectively we focused on those ends; and third, it was deliberate about exploring ways to enable UU Westport to manage itself in more productive and financially sustainable ways. We believe we've made good progress.

Accomplishments of note:

¹ Worship and spiritual connection (End 1.1.1); financial and membership growth and health (End 1.2.4) ; applying our UU values to broader [world] stage (End 1.3.7)

- **Settled search.** Encouraged and supported the settled search team in their efforts. This team got really underway in June/July 2025.
- **New interim minister.** Supported our new contract minister, Rev. Carlton, knowing he was going to be with us for only a year and we're a big, complex organization that can be difficult to navigate
- **Congregational decision-making.** Endorsed a practical and appropriate way for the congregation to make decisions, understanding that the work - which involved congregational discussions and a Decision-Making Framework - will need to be road-tested and refined as time goes on.
- **Operations Council.** Set up and oversaw an Operations Council to free up minister and staff time so they can focus primarily on worship, faith formation, pastoral care and social justice. With the Board's blessing, the Council has added a Volunteer Brigade this spring to help them on an ad-hoc, as-needed basis.
- **Preservation efforts.** Set up a Preservation Advisory Group to examine long-term maintenance issues, so we can prepare financially for them. In that spirit, we were honored to establish the Rev. Frank A. Hall Preservation Fund to support the upkeep of the campus and its buildings.
- **Treadwell legacy.** Accepted a generous gift from former member Nancy J. Treadwell. Set up a 7-person team to design the processes for the congregation to decide how best to use this gift of over \$800,000.
- **Stewardship.** Re-energized Stewardship to create a powerhouse team that delivered for the year. The Board is grateful that Rev. Carlton agreed to lead stewardship, and it authorized funding of consultants to provide an extra boost to the effort. The team delivered stellar results both in the Annual Drive in December 2025, and the Pledge Drive in March/April 2026.
- **Ministerial leadership 2026+.** Oversaw finding a Contract-to-Call minister to serve us, when a settled minister search did not yield a match in late March. This was an unexpected challenge that ended up serving us well. We are thrilled to have Rev. Terri Dennehy with us for the next three years, with the option for the congregation to call her into settled ministry, should both parties agree.
- **Investing for the future.** Continued to explore ways to shore up our finances, take care of our buildings, and importantly - building up our UU community, both within and beyond our walls.

Throughout the year, we stayed connected to the congregation through Sunday coffee hours, settled search and stewardship cottage parties, questionnaires, and many purposeful 1:1 conversations. We might have liked to have held more after-service meetings, but the calendar was full with committee work and engaging activities, and we believed they should take precedence. Notably, our open monthly meetings consistently drew observers from the congregation.

The Board is focused on building on this work in the year ahead. There are some issues that continue to be on our radar, and we invite the congregation to work on these together. These include:

- **Operations.** Fine-tuning the Operations Council, Volunteer Brigade and how it can interface best with the minister and staff
- **Decision-Making.** Continuing to refine the Decision-Making guidelines so everyone is clear about our processes and where to go if there is disagreement or discontent
- **Treadwell Gift.** Supporting the Treadwell team as it leads us through a discernment process so we can honor Ms. Treadwell's intentions while also addressing our needs
- **Capital investments in building and repairs.** Exploring how we identify, manage and pay for major building expenses, over time.
- **Ongoing budget support.** Purposefully building in new income streams beyond pledging. Where do we find these? How do we support them?
- **Stewardship.** This year was terrific, with a one-time pledge-matching incentive. How do we keep this energy and these results alive? How can we best support the congregation on this?
- **Ministerial support:** We all want to make sure Rev. Terri is set up for success. How does she get to know us in a way that serves us both? What are our processes for keeping two-way conversations going? What does she need from us now? In six months? A year?

- **Shifting volunteer efforts from internal to external priorities.** We have a large number of resources dedicated to internal management. (The Board, COM, Ops Council, Finance, Endowment, Nominating, Right Relations, Treadwell, Search/Minister Relations.) This has constituted up to 80 people on an ongoing basis. How can we trim that back, so we can prioritize our energies on our mission to inspire, connect and act - including in the greater community?

As we close fiscal year 2025-26, we're pleased our efforts are bearing fruit. We're in good financial shape for next year. We have a vibrant and engaging Contract-to-Call minister starting with us in August: we're excited about what Rev. Terri Dennehy and our congregation can create together. Our services are growing in attendance and enthusiasm; membership is up. It's uplifting to hear so many children's voices in the sanctuary, and our music filling the space each Sunday morning has been just what we've all needed during these difficult times in our world. We're at a "springboard" moment.

A special thank you to Rev. Carlton - who has been fabulous at setting a tone of calm, optimism and abundance with his thoughtful leadership. We will miss him. Also, our sincere gratitude to the staff who, even as lean a team as they are, make a huge difference for us every day, often without our being aware of all they are doing behind the scenes. And a special call out to the countless volunteers who work hard to make our UU Westport home a safe spiritual haven for so many of us. Thank you, all.

Respectfully submitted, Beth Cliff, on behalf of the full 2025-2026 Board: Sari Bodi, Dayle Brownstein, Beth Cliff, Mark Corcoran, Jon Gage, Felicia Keeton, Alexa Marshall, Julyen Norman, Ravi Sankar

Committee on Ministries (COM)

Dispute over the Floor Color Vote. Our 2026 church year began with managing a dispute over the vote for the color of the sanctuary floor. There were some who felt that rank choice voting was unfair and possibly rigged to favor certain parties within the congregation. After reviewing the rules and process of ranked choice voting and reviewing the manner in which it was handled at UU Westport, as well as discussing long & hard within the committee, COM decided that the voting was done properly and that a revote was not necessary. 73

Cupcakes with COM. In an effort to answer "Who is COM & What do they do?" our committee offered Cupcakes with COM, (in the vein of Bagels with the Board), after the service one Sunday. We made ourselves available to speak with congregants regarding our role in the UU community. It also provided us the opportunity to advertise our month-long Compassionate Communication Workshop and the benefits we felt it could bring to the congregation. 57

Compassionate Communications Workshop. COM member Denise Carreau, together with Steve Rosenberg, presented this month-long workshop to educate people on communication skills and understand better, more compassionate ways of having healthy discussions with each other. Both Steve and Reverend Carlton presented this workshop earlier and felt it beneficial for a community that has had some contentious issues in the past! As the committee that deals with conflict management, COM felt it important that we all participate in this workshop, which most of the committee were able to do. 75

Committee Fun Fair. COM is actively working with the membership committee, as well as other committees, for the Fall Committee Fun Fair. There is much excitement in getting the outside community to better know who we are with the hopes of attracting newer, younger members. 33

Submitted by Melanie Allen

Endowment Committee

The Endowment Committee manages the Congregation's capital funds to further the mission of the Congregation and to preserve assets to enhance the long-term financial security of the Congregation. The endowment members are: Ken Vogel, Tom Hearne, Cindy Potter, Steve Grathwohl and Terri Laug.

The endowment committee maintains several funds, some of which have restrictions on their use placed by the donor or by the board. These funds are as follows:

General Fund (Unrestricted)

- Board may request distributions up to 10% of the Endowment in a fiscal year.
- Requests beyond 10% require 2/3s vote of Congregation present at meeting.

Bernhard Music fund

- Donor restrictions: For the benefit of the music program
- Board restrictions: ⅔ of income for enhancements, not for salaries

Wertheim fund

- Donor restrictions: grounds maintenance, outside speakers or urgent needs: congregational or structural. ½ of accumulated income / growth.

Scouller/Nelson Fund

- Donor restrictions: enhance family faith formation
- Board restrictions: ⅔ of income, option for one-time 10% use of principal

Jan Park Social Justice

- Donor restrictions: Social Justice recommended, not required

B&G, Lifespan funds

- Board restrictions: to be used as designated

As of March 31, 2026, the balances of these funds are:

Wertheim	\$2,065,644
Scouller/Nelson	\$152,038
Social Justice	\$51,329
Bernhard Music	\$498,230
General	\$1,166,847
B&G	\$7,671
Total	\$3,941,759

Recent Historical Balances:

Date	6/30/2025	6/30/2024	6/30/2023	6/30/2022	6/30/2021	6/30/2020	6/30/2019
Wertheim	2,456,313	2,318,507	1,985,678	1,869,908	2,003,480	1,559,682	1,534,808
Scouller/ Nelson	138,626	127,579	106,232	102,905	61,596		
Social Justice	46,801	43,072	37,353	54,439	54,448	39,712	41,376
Bernhard Music	454,279	431,075	382,381	356,734	363,180	283,641	287,069
General	1,091,466	990,652	956,293	932,930	1,057,686	932,832	1,056,849
B&G	6,994	6,437	5,565	5,193	5,193	3,787	3,946
Lifespan			4,071			3,787	3,946
Total	4,194,479	3,917,322	3,477,573	3,322,109	3,545,583	2,823,441	2,927,994

Last year, over \$600,000 was paid from the Wertheim fund to support our capital campaign work.

The endowment regularly contributes money to fund the operating budget or special projects of the congregation. These funds come entirely from the unrestricted (general) funds. The following table shows our recent contributions from the unrestricted General Fund:

Fiscal Year Ending	Contribution
2018	25,000
2019	30,000
2020	30,000
2021	30,000
2022	30,000
2023	75,000
2024	80,000
2025	53,000
2026	40,000 (est)

In 2023 and 2024 (and planned for 2025), the congregation was increasing its request from the endowment each year. The endowment committee worked with the board to reduce our budget, which has brought the request back to a sustainable level.

As you may have heard in Soundings and other communications, the congregation received a generous bequest of just over \$800,000 from Nancy Treadwell. The endowment committee will temporarily oversee this money while the congregation decides what to do with it. The fact that we are overseeing it does not mean it's part of the endowment - the congregation has full discretion to decide on its use, and the board has appointed a committee to investigate this.

Respectfully submitted, Ken Vogel, Chair

Nominating Committee

The Nominating Committee is composed of 5 congregational members and charged with filling vacant positions on the four elected congressional committees.

The Process. Meeting monthly, we first reviewed the guidelines that inform our responsibilities. We then sought input from members of the other elected committees to determine their anticipated vacancies as well as the type of person they felt would fit best on their committee. With that knowledge, we put together a list of candidates who have been members for at least one year and fit the criteria the best for each committee. Our list is then sent to the Board of Trustees before the vote takes place at the Annual Meeting.

The Slate of NEW Nominees for Election on June 14, 2026

Board of Trustees

- Ben Chan (1st term - 2029)
- Elena Rockman (1st term - 2029)
- Alison Smith (1st term - 2029)

Commission on Ministries

- Teryl Eisenberg (2029)
- Steve Rosenberg (2029)

Nominating Committee

- Kate Croarkin (2028)
- Sean Feuer (2028)
- Anita Pfluger (2028)

Endowment

- Chuck Colletti (2031)

Respectfully submitted by Melissa Balmer (co-chair), Lindy Hennessy (co-chair), Nancy McKeever, Jim Cooper, and Eileen O'Reilly

BOARD APPROVED COMMITTEES

Audit Committee Report

We retained the firm of Hope & Hernandez, P.C. again this year to do the audit of our financial statements for the fiscal year ending June 30, 2025, and to prepare our 2025 Tax Return (Form 990-T).

UUWestport's financial Statements are prepared on a Modified Cash Basis. The Modified Cash Basis provides an extra level of insight into our finances that cannot be gained by just using cash basis accounting. One example of Modified Cash Basis is how short-term and long-term items are treated. Short-term items, such as recurring monthly expenses (utilities, landscaping, internet etc.) are recorded on the income statement according to cash basis. Long-term items such as fixed assets or property and equipment are recorded on the balance sheet using the accrual method.

The Form 990-T is the IRS form used by nonprofit organizations to report "unrelated income". For UUWestport, this primarily relates to our parking lot income. In almost every year, the parking lot income is offset by parking lot expenses, so we do not need to pay any taxes. Importantly, the IRS does not consider the rent received from our nursery school to be unrelated income, so we also pay no taxes on this income.

Due to the lack of historical cost data, UUWestport estimated a \$3,000,000 beginning balance of the value of land, buildings, furniture, fixtures, and equipment as of July 1, 2014. The Congregation then began depreciating its fixed assets in the year ended June 30, 2015. Due to this lack of historical cost data, any Auditor's Opinion that we receive (now and in the future) will always be a "Qualified Opinion".

In all other respects, the auditor concluded that the financial statements were presented fairly in all material respects.

The auditor noted that our financial position is sound, with good cash, almost no liabilities, and a strong equity position. No material adjustments or internal control concerns were noted.

The audit report was reviewed and approved by the Audit Committee on December 22, 2025. A copy of the Audit is available for review in the UUWestport office.

In past years UUWestport would rotate between doing a full audit one year and a limited “review” the next year. In a full audit year, the auditor fees would be about \$8,000. In a limited review year, the auditor fees would be about \$6,000. Given that we have increased our financial oversight and given the comfort that a full audit provides, UUWestport decided to do an audit each year, rather than only every other year.

The cost of our 2025 Audit was \$8,150 and the cost to prepare our Form 990-T was \$420.

Respectfully submitted, Stephen Grathwohl and Mark Corcoran

Contract Minister Search Team

Ministerial Search Roadmap & Decision to Hire Rev. Terri Dennehy. UU Westport’s ministerial search entered a new phase in late March after the Settled Search process did not yield a match. The committee proceeded to look for a 3-yr Contract to Call minister, shifting the team’s focus to identifying a strong long-term partner for the congregation. A combined team of Board members and prior search members began conversations in early April, ultimately engaging with three candidates. In parallel, the committee also explored a shared ministry model as a contingency.

Across multiple meetings, interviews, reference checks, and discussions, Rev. Terri Dennehy emerged as the clear choice. The Committee received “glowing recommendations” from five references and affirmed her strong alignment with UUWestport’s mission, values, and priorities. The Board motion authorized and completed negotiations for a full-time, three-year Contract-to-Call ministry beginning August 2026, with the option to transition to a Settled Ministry upon mutual consent.

Rev. Terri currently serves UU Stamford, where she has “helped grow their congregation and UU presence since 2021.” She brings 20+ years of UU leadership, an earth-centered spirituality, deep experience in worship, pastoral care, faith formation, and social justice, and a reputation for collaboration, warmth, and organizational skill. Her contract commits her to being onsite three weekdays plus Sundays.

This decision provides long-awaited stability and positions UU Westport for sustained growth and connection.

Beth Cliff, Chris Aquino, Elena Rockman-Blake, Felicia Keeton, Sari Bodi, Tom Hearne

Finance Committee Report

The Finance Committee and its members are appointed by and report to the Board. The committee’s roles include financial oversight, project and cost monitoring, research and fiduciary advice. A central role is preparing the Congregation’s annual operating budgets, in partnership with the Senior Minister, Treasurer and Accountant. The Committee tracks monthly financial performance against budget goals and screens against risks to financial stability.

**** Coordinating the Capital Campaign** – Last year, during planning for the Sanctuary renovation project, the Committee screened cost estimates and timelines on behalf of the Board and Treasurer, backing up project supervisor John Turmelle and Accountant Sue O’Meara.

When the renovation work began in earnest, last summer, the committee was well-positioned to help track overall costs and anticipate timing of individual work invoices and payments due. That allowed the Board to

stream batches of requests to the Endowment Committee to transfer hundreds of thousands of dollars to the Congregation's accounts, where Sue issued individual checks for the renovation work.

**** Breaking Down the Silo Walls** – The Finance and Endowment committees, long accustomed to keeping their own counsel, agreed last fiscal year to communicate and coordinate more closely. They began by sharing viewpoints and data from each team's work.

The conversation soon shifted to concerns over the Congregation's persistent operating-budget deficits and finding a path to "financial sustainability". The resulting plan set graduated benchmarks for increasing pledge revenue to cover staff costs in exchange for continued Endowment support. That agreement, finalized in a series of budget scenarios produced by the Finance Committee for the Board, laid the groundwork for approval of the FY'26 and FY'27 budgets.

More recently, the committees extended their cooperation to a "shared" bank account, after the Congregation received the Treadwell family's unexpected \$809,000 bequest. The Board voted to place the funds in the care of the Endowment team, which first needed time to finish account adjustments. The Finance Committee offered the Treadwell fund a temporary home in the Congregation's own American Deposit Management account, where it now temporarily resides, securely and productively.

**** Saving \$17,000 on Insurance** – One of the Finance Committee's most valued but nuanced roles is identifying and exploiting opportunities for the congregation's revenue growth and cost savings. Steve Grathwohl, member of both the Finance and Endowment Committees, is a dedicated practitioner of the art.

Last fall, Steve teamed up with entrepreneurial insurance agent to negotiate alternative coverage that saves the Congregation \$17K annually. The Finance Committee reviewed and approved the plan. While Steve was traveling the deal was finalized by a multidisciplinary tag team including accountant Sue O'Meara, Rev. Carlton, the Treasurer, and the Board President Beth Cliff.

Other FinCom research has included solar power investments, Meeting House usage revenues, and establishing an Innovation Fund.

Committee members are Mark Corcoran, Mary-Jane Cross, Steve Grathwohl, Elena Rockman-Blake and Bob Trefry. Rev. Carlton Smith, and accountant Sue O'Meara are ex-officio (nonvoting) members. (The committee is chaired by the Treasurer, Jon Gage, a Board member.)

The Committee's monthly meetings are open for congregants to observe either live or by Zoom (except during executive sessions, such as for personnel matters). Normal meeting schedule: third Thursday of the month, 7pm, in the Library of UU Westport.

Respectfully Submitted by Jon Gage, Treasurer

FY'27 Proposed Budget (Chart 1: Page 1)

1	UWestport FY'27 Proposed Budget July 1, 2026 - June 30, 2027		FY'26 Reforecast	FY'27 Proposed Budget	Variance FY'27 vs Reforecast
2	Ordinary Income/Expense				
3	Income				
4	4009 • Pledge Income				
5		4000 • Pledge Income - Current Year	550,000	590,000	40,000
6		4000.5 • Pledge Anticipated Reduction	-27,500	-29,500	-2,000
7		4002 • Pledge Income - Prior Year	2,479		-2,479
8		Total 4009 • Pledge Income	524,979	560,500	35,521
9	4049 • Other-Unrestr Contributions		0		
10		4020 • Non-Pledge Contributions	0		
11		4020.5 • Non-Pledge Contr-Holiday Appeal	29,604	25,000	-4,604
12		4020 • Non-Pledge Contributions - Other	40,046	26,000	-14,046
13		Total 4020 • Non-Pledge Contributions	69,650	51,000	-18,650
14		4010 • Plate Collection	23,897	24,000	104
14.1		4011 - Spring Campaign: matching-gift program		88,000	88,000
15		Total 4049 • Other-Unrestr Contributions	93,546	163,000	69,454
16	4040 • Restricted Contributions		15,645	5,000	-10,645
16.1	4041 - The Rev. Frank A. Hall Preservation Fund			10,000	10,000
17		4040.2 • Flowers	1,800	1,800	0
18	4185 • Fundraisers		0		0
19		4085.1 • Fall Fundraiser	9,586	10,000	414
20		4085.2 • Spring Fundraiser	10,000	10,000	0
21		4185 • Fundraisers - Other	14,244	13,500	-744
22		Total 4185 • Fundraisers	33,830	33,500	-330
23		4186 • Voices Cafe' Concert Income	10,087	5,000	-5,087
24		4190 • Pass Thru Share the Plate	17,483	18,000	517
25	4269 • Facility Use Fees		0		
26		4261 • Facility Use - Nursery School	86,100	88,200	2,100
27		4262 • Facility Use - Other	0		0
28		4262.7 • Tech Services for Rentals	0		0
29		4262.1 • Tech Service Income for Rentals	2,500		-2,500
30		4262.5 • Tech Service Expense- Rentals	-975		975
31		Total 4262.7 • Tech Services for Rentals	1,525		-1,525
32		4262 • Facility Use - Other - Other	10,456	10,000	-456
33		Total 4262 • Facility Use - Other	11,981	10,000	-1,981
34		4264 • Parking Lot Rentals	2,900	3,300	400
35		4269 • Facility Use Fees - Other	65		-65
36		Total 4269 • Facility Use Fees	101,046	101,500	454
37	4719 • Other Income		0		
38		4710 • Interest Earned	642	300	-342
39		4716 • Other / Misc.	1,600	1,600	0
40		4030.1 • Trips	700		-700
41		Total 4719 • Other Income	2,941	1,900	-1,041
42	Total Income		801,358	900,200	98,842

FY'27 Proposed Budget (Chart 1: Page 2)

1	UWestport FY'27 Proposed Budget July 1, 2026 - June 30, 2027				FY'26 Reforecast	FY'27 Proposed Budget	Variance FY'27 vs Reforecast
43							
44		Expense			0		
45		5450 · Total People Cost - BL			0		
46		5000 · Total Comp, Benefits & Taxes			0		
47		Total 5008 · Salary, Housing and Wages			388,685	415,846	27,161
48		Total 5029 · Payroll Tax, Sui, Fica, SECA, WC			38,382	35,132	-3,250
49		Total 5019 · Pension			35,998	34,825	-1,173
50		5024 · Medical/Dental & Disability			62,903	60,740	-2,163
51		Total 5000 · Total Comp, Benefits & Taxes			525,968	546,543	20,575
52		5070 · Professional Expense Allowances			0		
53		5003 · Senior Minister-Prof Exp			5,000	9,000	4,000
54		5404 · Music Professional Exp			1,500	2,250	750
55		5033.2 · Faith Formation Prof Exp			1,500	1,500	0
56		5033.3 · Congregational Admin Prof Exp			500	500	0
57		5033.4 · Accountant Prof Expense			500	0	-500
58		Total 5070 · Professional Expense Allowances			8,999	13,250	4,251
59		5300 · Contracted Services			0		
60		5350 · Cleaning Janitorial			15,250	17,940	2,690
61		5929 · Contractor-Worship Audio Visual			8,600	10,400	1,800
62		5939 · Contractor - IT			3,520	3,520	0
63		5932 · Contractor - Website			3,600	5,400	1,800
64		Total 5300 · Contracted Services			30,970	37,260	6,290
65		Total 5450 · Total People Cost - BL			565,938	597,053	31,115
66		5380 · Maint & Insurance - BL			0		
67		5309 · Building Maintenance & Repairs			0		
68		5301 · Maintenance&Inspection Services			8,500	10,400	1,900
69		5302 · Supplies, Hardware & Janitorial			4,000	4,000	0
70		5303 · Repairs			5,000	5,000	0
71		5305 · B & G Projects - BL			5,000	20,000	15,000
72		Total 5309 · Building Maintenance & Repairs			22,500	39,400	16,900
73		5359 · Grounds Maintenance			0		
74		5351 · Lawn Mowing & Leaf Removal			12,000	12,000	0
75		5354 · Landscaping & Gn ds Maint Other			3,000	3,000	0
76		5352 · Snow Removal			13,500	14,000	500
77		5356 · Tree Work			5,450	6,000	550
78		Total 5359 · Grounds Maintenance			33,951	35,000	1,049
79		5379 · Church Insurance			0		
80		5371 · Property & Casualty Insurance			18,618	25,778	7,161
81		5372 · Umbrella Insurance			1,173	490	-683
82		Total 5379 · Church Insurance			19,790	26,268	6,478
83		Total 5380 · Maint & Insurance - BL			76,240	100,668	24,428

FY'27 Proposed Budget (Chart 1: Page 3)

1	UUWestport FY'27 Proposed Budget July 1, 2026 - June 30, 2027			FY'26 Reforecast	FY'27 Proposed Budget	Variance FY'27 vs Reforecast	
84		5549 · Materialsfor Program&Worship-BL			0		
85		5520 · Total Worship & Ministries			0		
86		5529 · Worship Services			0		
87			5522 · Flowers	2,300	2,300	0	
88			5524 · Soul Matters	1,000	1,000	0	
89			5513 · Worship Licenses	1,000	1,000	0	
90			5526 * Pulpit Guests		3,900	3,900	
91			5562 · Pastoral Care	200	200	0	
92			5525 · Worship/Sunday Services	750	750	0	
93		Total 5529 · Worship Services			5,250	9,150	3,900
94		5528 · Misc Ministries			0		
95			5528.1 · Use of Restricted Worship Funds	36		-36	
96			5528 · Misc Ministries - Other	2,000	0	-2,000	
97		Total 5528 · Misc Ministries			2,036	0	-2,036
98		Total 5520 · Total Worship & Ministries			7,286	9,150	1,864
99		5550 · Music Program Total			0		
100			5531 · General Music	2,000	2,500	500	
101			5531.5 · Use of Restricted Music Funds	0			
102			5531.8 · Use of Restricted BernhardMusic	18,423	18,000	-423	
103			5531.5 · Use of Restricted Music Funds - Other	7,196	4,000	-3,196	
104			Total 5531.5 · Use of Restricted Music Funds	25,619	22,000	-3,619	
105			5531.7 · Use of Restricted - Accompanist	5,825	6,000	175	
106		Total 5550 · Music Program Total			33,444	30,500	-2,944
107		5530 · Family Faith Formation			0		
108			5575.7 · Use of Restricted Faith Formation Funds	5,000	10,000	5,000	
109			5575.5 · Use of Restricted - Children	5,000	0	-5,000	
110			5536 · Adult Faith Formation	500	500	0	
111			5675 · Faith Formation Curr & Supplies	1,500	1,800	300	
112		Total 5530 · Family Faith Formation			12,000	12,300	300
113		5532 · SJ Program Expense			0		
114			5532.1 · Gender Equity Team	197		-197	
115			5532.6 · Racial Justice Matters	150		-150	
116			5532.8 · CIRI	500		-500	
117			5532.7 · Social Justice Council	5,153	6,000	847	
118			5532.5 · Use of Restricted SJ Funds	0		0	
119			5532.9 · Use of Social Justice Reserve	2,686	3,000	314	
120			5532.5 · Use of Restricted SJ Funds - Other	314		-314	
121			Total 5532.5 · Use of Restricted SJ Funds	3,000	3,000	0	
122		Total 5532 · SJ Program Expense			9,001	9,000	-1
123		Total 5549 · Materialsfor Program&Worship-BL			61,731	60,950	-781

FY'27 Proposed Budget (Chart 1: Page 4)

1	UWestport FY'27 Proposed Budget July 1, 2026 - June 30, 2027	FY'26 Reforecast	FY'27 Proposed Budget	Variance FY'27 vs Reforecast
124	5630 · Office & Utilities - BL	0		
125	5629 · Office Equipment	0		
126	5605 · Equipment Leasing	2,746	2,746	0
127	5610 · Computer Equipment&Furnishings	1,403	2,000	597
128	5620 · Computer Expense/Software	7,006	7,200	194
129	5621 · Website Applications	3,000	2,500	-500
130	Total 5629 · Office Equipment	14,155	14,446	292
131	5609 · Office Expense/Services	0		
132	5601 · Payroll Processing	2,771	2,800	29
133	5602 · Office Expense&PrintedMaterial	3,319	3,500	181
134	5603 · Telephone/Cable	9,426	9,400	-26
135	5604 · Postage	1,000	1,000	0
136	Total 5609 · Office Expense/Services	16,516	16,700	184
137	5269 · Utilities	0		
138	5261 · Fuel Oil	4,852	5,100	248
139	5262 · Electricity	18,583	29,000	10,417
140	5264 · Refuse	4,237	4,700	463
141	5267 · Water	2,297	2,600	303
142	5268 · Natural Gas	8,983	9,500	517
143	Total 5269 · Utilities	38,953	50,900	11,947
144	Total 5630 · Office & Utilities - BL	69,624	82,046	12,422
145	5709 · Denominational - BL	0		
146	5701 · UUA Annual Program Fund (APF)	20,000	26,000	6,000
147	5702 · Miscellaneous Dues & Expenses	2,000	2,000	0
148	Total 5709 · Denominational - BL	22,000	28,000	6,000
149	5810 · Fundraising Expenses - BL	6,556	4,900	-1,656
150	5820 · Voices Cafe' Expenses	5,991	2,500	-3,491
151	5850 · Pass Thru to Charity - BL	0		0
152	5964 · Minister's Discretionary Exp	3,754	3,000	-754
153	5830 · Voices Cafe' Beneficiary	0	0	0
154	5850 · Pass Thru to Charity - BL - Other	17,483	18,000	517
155	Total 5850 · Pass Thru to Charity - BL	21,237	21,000	-237
156	5945 · Audit,Pmt Process&Bank Fees-BL	0		
157	5920 · External Audit/Review Expense	8,500	8,500	0
158	5930.1 · Brokerage Fee	250	400	150
159	5933 · Credit Card Expense	4,966	6,000	1,034
160	5935 · Bank Charges & UBIT Taxes&Fees	100	100	0
161	Total 5945 · Audit,Pmt Process&Bank Fees-BL	13,816	15,000	1,184
162	5949 · Miscellaneous Expense - BL	0		
163	5533 · Membership Committee	750	750	0
164	5571 · Stewardship Committee	750	750	0
165	5924 · Board of Trustees	1,316	750	-566
166	5938 · Kitchen Supplies	300	300	0
167	5940 · Misc Food & Beverage	1,500	1,750	250
168	5941 · Coffee Hour	1,000	1,000	0
169	5942 · Congregational Gatherings	750	1,000	250
170	5943 · 75th Anniversary Party	0	0	0
171	5936 · Minister Search & Installation	17,000	0	-17,000
172	5963 · Background Check & Hiring	754	900	146
173	5949 · Miscellaneous Expense - BL - Other	1,430	500	-930
174	Total 5949 · Miscellaneous Expense - BL	25,551	7,700	-17,851
175	Total Expense	868,683	919,817	51,134

FY'27 Proposed Budget (Chart 1: Page 5)

1	UWestport FY'27 Proposed Budget July 1, 2026 - June 30, 2027				FY'26 Reforecast	FY'27 Proposed Budget	Variance FY'27 vs Reforecast
176							
177	Net Ordinary Income				-67,325	-19,617	47,708
178							
179	Other Income/Expense						
180	Other Income						
181		4850 · Other Sources of Cash			0		
182		4730 · Use of Prior Year Reserve			0		
183		4735 · From Children Are Our Future			20,000	0	-20,000
184		4724 · From Social Justice Reserve			3,000	3,000	0
185		4740 · From Sabbatical Reserve			5,000	0	-5,000
186		4721 · From Music Reserve			0		0
187		4721.5 · From Accompanist Fund Reserve			5,825	6,000	175
188		4721 · From Music Reserve - Other			7,196	4,000	-3,196
189		Total 4721 · From Music Reserve			13,021	10,000	-3,021
190		4708 · From Building Reserve			5,000	20,000	15,000
191		Total 4730 · Use of Prior Year Reserve			46,021	33,000	-13,021
192		4717 · Endowment Jan Park SJ Distribution			6,000	6,000	0
193		4747 * Scouller/Nelson Distr Faith Formation			0	10,000	10,000
193.5		4718* From Wertheim Restricted Endowment				3,900	3,900
194		4711 · Endowment Dist - To Operating			0		
195		4711.5 · Endowment Distr-Bernhard Music			18,423	18,000	-423
196		4711.6 · Endow Distr-Worship Constr Exp			0	0	0
197		4711.7 · Endow Distr Revenue Consultant			13,000	0	-13,000
198		4711 · Endowment Dist - To Operating - Other			30,000	30,000	0
199		Total 4711 · Endowment Dist - To Operating			61,423	48,000	-13,423
200		4730.5 · Marketing Website			10,000	10,000	0
201		Total 4850 · Other Sources of Cash			123,444	110,900	-12,544
202		Total Other Income			123,444	110,900	-12,544
203							
204		Other Expense			0		
205		5800 · Other Uses of Cash			0		
206		5800.4 · Railing Replacement			5,750		-5,750
207		5800.8 · New Dishwasher - 2025			7,038		-7,038
208		5800.5 · Marketing Website			10,000	10,000	0
209		5800.7 · Revenue Consultant			13,000	0	-13,000
210		5370 · Contrib to Reserve - BL			0		0
211		5980 · Voices Café FY'27 profit - Move to SJ Reserve			10,000	2,500	-7,500
212		** The Rev. Frank A. Hall Preservation Fund				10,000	10,000
213		** Replenish B&G Repair Reserve Fund				30,000	30,000
214		** General Reserve Fund				38,783	38,783
215		Total 5370 · Contrib to Reserve - BL			10,000	81,283	71,283
216		Total 5800 · Other Uses of Cash			45,788	91,283	45,495
217							
218		NET INCOME BUDGET VIEW			10,331	0	-10,331

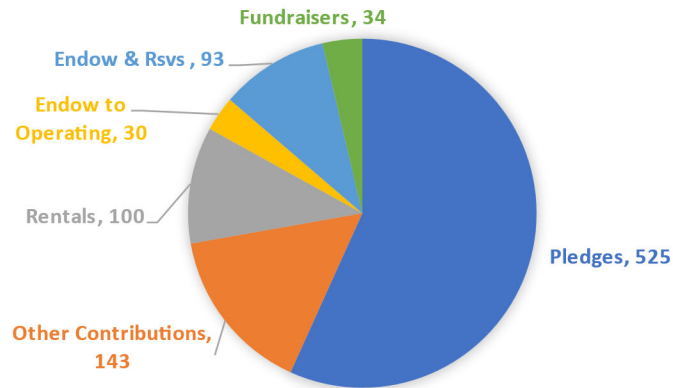
Balance Sheet Comparison FY'25 vs FY'26 (as of April 2026) (Chart 2: Page 1)

					June 2025	April 2026	\$ Change
1	ASSETS						
2	Current Assets						
3	Checking/Savings						
4	1021 · Fairfield County Bank-Checking				170,225	191,728	21,503
5	1031 · Construction Checking Account				13,485	267	-13,218
6	1028 · Fairfield County Bank-Savings				89,293	89,430	137
7	1023 · Voices Cafe-Checking				3,000	464	-2,536
8	1051 - Venmo				406	3,150	2,744
9	1032 · Stripe						0
10	1027 · Stripe-Voices					104	104
11	1029 · Stripe					418	418
12	Total 1032 · Stripe				0	522	522
13	1026 · Minister's Discretionary-Cking				951	4,659	3,708
14	1041 · ADM Account				202,451	805,436	602,985
15	1050 · Petty Cash				13	13	0
16	Total Checking/Savings				479,824	1,095,669	615,845
17	Total Current Assets				479,824	1,095,669	615,845
18							
19	Fixed Assets						
20	1400 · Land				1,000,000	1,000,000	0
21	1403 · Land Improvements				343,620	343,620	0
22	1401 · Church Building				1,000,000	1,000,000	0
23	1404 · Meeting House				913,889	913,889	0
24	1407 · Building Improvements				188,480	188,480	0
25	1407.5- Building Improvements-Capital Campaign				1,149,016	1,149,016	0
26	1408 · Furniture, Fixtures & Equipment				113,218	113,218	0
27	1408.7 - New Stove				8,634	8,634	0
28	1408.65 - AV Equip Sound System				25,085	25,085	0
29	1409 · Construction				364,410	1,190,917	826,507
30	1450 · Accumulated Depreciation				-1,112,960	-1,112,960	0
31	Total Fixed Assets				3,993,392	4,819,899	826,507
32							
33	Other Assets						
34	1500 · Investment Accounts - Restricted						
35	1510 - Restricted - Other Accounts						
36	1503 · Restricted-Bernhard Music				454,279	498,230	43,951
37	1506 · Vanguard-Scouller/Nelson Fund				138,626	152,038	13,412
38	1510 - Total Restricted - Other Accounts				592,905	650,268	57,363
39							
40	1520 - Restricted - Endowment Accounts						
41	1509 · Vanguard 2005 - Restricted				2,456,313	2,065,644	-390,669
42	1505 · Vanguard - Social Justice-Restricted				46,801	51,329	4,528
43	1507 · Vanguard-Building&Grounds Restricted				6,994	7,671	677
44	1520 - Endowment Restricted Accounts				2,510,108	2,124,644	-385,464
45	1500 · Total Investment Accounts - Restricted				3,103,013	2,774,912	-328,101
46							
47	1530 -Endowment Unrestricted Accounts						
48	1501 · UUA Common Fund				757,726	791,859	34,133
49	1502 · Vanguard General Fund				333,741	374,988	41,247
50	1530 -Total Endowment Unrestricted Accounts				1,091,467	1,166,847	75,380
51	1540-Total of all Endowment Accounts				3,601,575	3,291,491	-310,084
52							
53	Total Investment Accounts-Restricted and Unrestricted				4,194,480	3,941,759	-252,721
54							
55	Total Other Assets				4,194,480	3,941,759	-252,721
56	TOTAL ASSETS				8,667,696	9,857,327	1,189,631

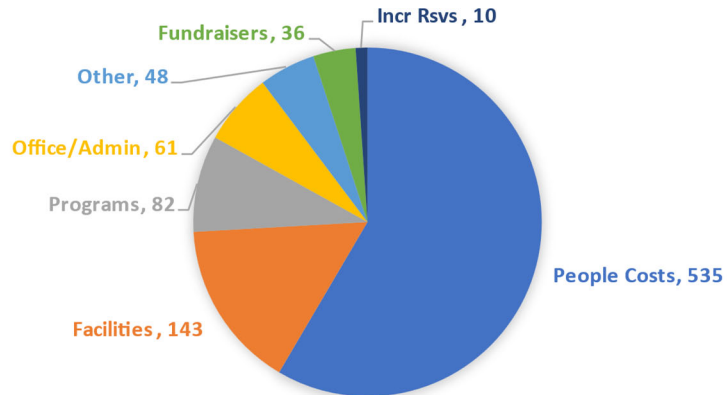
Balance Sheet Comparison FY'25 vs FY'26 (as of April 2026) (Chart 2: Page 2)

						June 2025	April 2026	\$ Change
57	LIABILITIES & EQUITY							
58	Liabilities							
59	Current Liabilities							
60	Other Current Liabilities							
61				2111 · Employee Pension Withholding		849	6,155	5,306
65				2680 · Credit Card Payable		0	1,150	1,150
66				2295 · Advance Pledge Payment		107,993	80,394	-27,599
67				Total Other Current Liabilities		108,842	87,699	-21,143
68				Total Current Liabilities		108,842	87,699	-21,143
69	Total Liabilities					108,842	87,699	-21,143
70								
71	Equity							
72	2130 · Reserves							
73				2528 · Memorial Garden Reserve		6,687	6,687	0
74				2542 · Building Reserve		37,032	33,712	-3,320
75				2555 · Groundskeeping Reserve		32,666	32,666	0
76				2760 · Sabbatical Reserve		9,965	9,965	0
77				2527 · Faith Formation-Youth Group Reserve		500	1,208	708
78				2225 · Children Are Our Future Reserve		20,815	11,359	-9,456
79				Total 2720 · Faith Formation Reserve		21,315	12,567	-8,748
80				2730 · Social Justice Reserve		18,599	13,550	-5,049
81				2740 · Music Reserves				
84				2530 · Accompanist Fund		36,528	32,702	-3,826
85				2507 · Restricted Music Reserve		0	8,829	8,829
86				2740 · Music Reserves - Other		17,202	12,767	-4,435
87				Total 2740 · Music Reserves		53,730	54,298	568
88				2750 · Worship & Ministries Reserves				
89				2650 · Camp Jewell		838	838	0
90				2320 · Shawl Ministry		1,027	720	-307
91				2750 · Worship & Ministries Reserves - Other		2,453	2,453	0
92				Total 2750 · Worship & Ministries Reserves		4,318	4,011	-307
93				Total 2130 · Reserves		184,312	167,456	-16,856
94								
95				3900 · Unrestricted Net Assets		5,108,890	5,221,884	112,994
96				3901 · Perm Restricted Net Assets		2,589,823	2,589,823	0
97				3902 · Temp Restricted Net Assets		502,031	502,031	0
98				3903 · Construction Net Assets		60,805	60,805	0
99				Construction Net Income		51,085	0	-51,085
100				UU Westport Net Income		61,908	1,227,629	1,165,721
101	Total Equity					8,558,854	9,769,628	1,210,774
102	TOTAL LIABILITIES & EQUITY					8,667,696	9,857,327	1,189,631

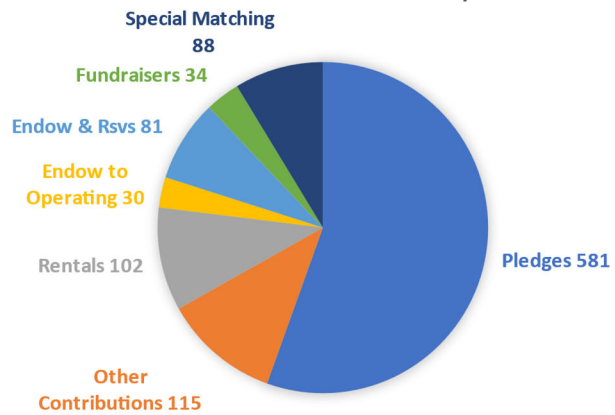
FY'26 REFORECAST REVENUE: \$925K

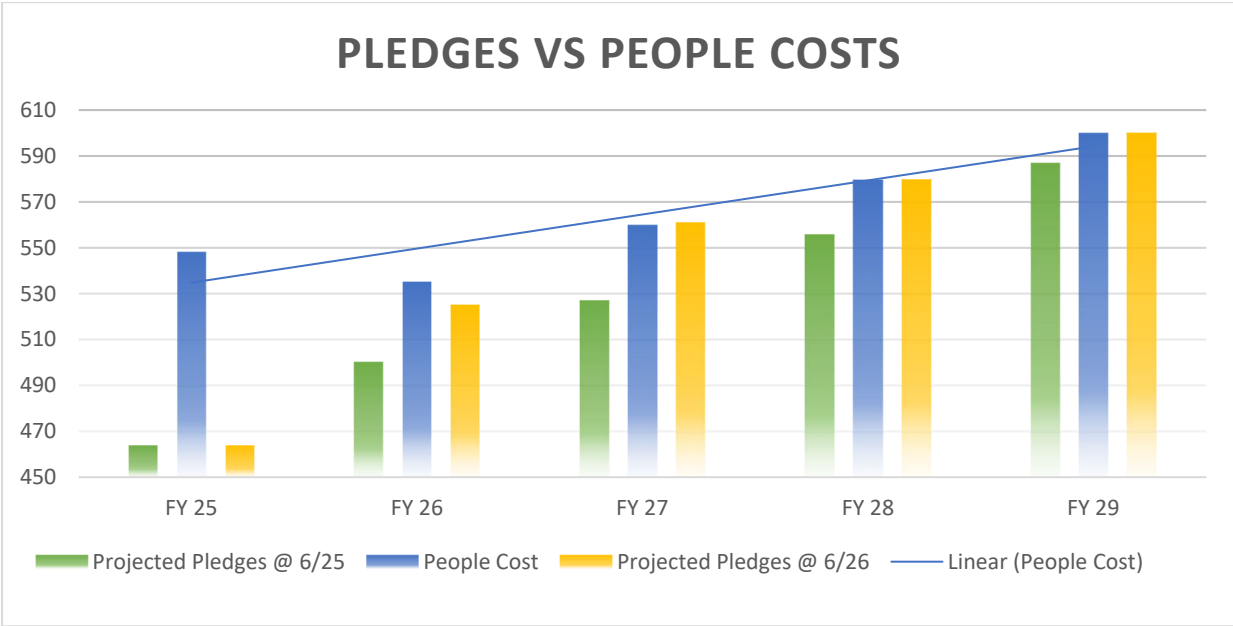
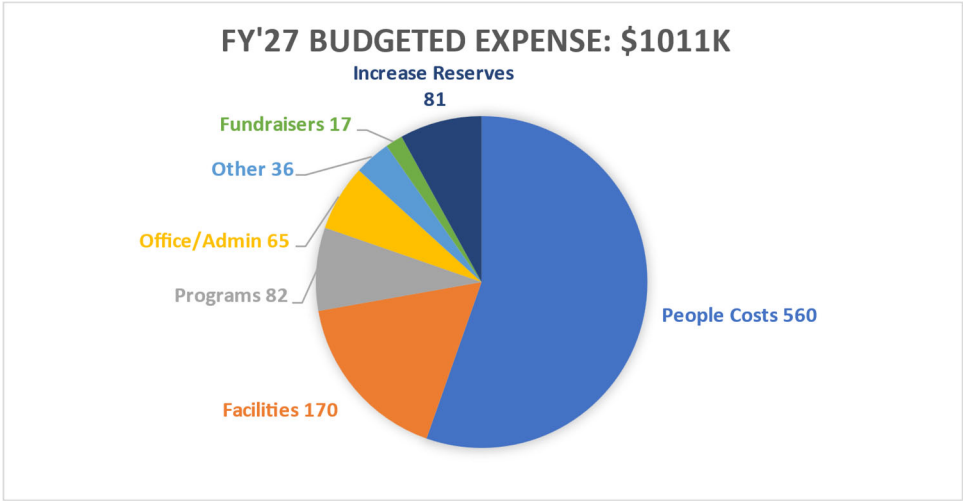


FY'26 REFORECAST EXPENSE: \$915K



FY'27 BUDGETED INCOME: \$1011K





Blue: Projected rise in people costs due to inflation

Green: Last year's goal: Cover people costs with pledges by FY'29

Tan: FY'27 Budget: Pledge revenues cover people costs two years earlier than expected

Financial Sustainability Committee (aka Development Team)

At the Development Team's recommendation, the Board of Trustees engaged Brian Lacy & Associates to strengthen UU Westport's culture of giving—and the partnership has been a clear success.

While stewardship outcomes improved, the most important impact has been culture change. Anthony Cernera and Chris Altrock initiated a structured Culture & Engagement listening process—45-minute congregant interviews—explicitly framed for discernment and reflection (not evaluation). Their work helped shift the congregation's mindset from "meeting needs" to "creating abundance," strengthening confidence that generosity is a shared spiritual practice and a community-building opportunity. The resulting Culture & Engagement findings will be shared in the Fall and are positioning UU Westport to carry forward stronger stewardship and engagement.

Operationally, the consultants delivered high-value capacity building—workshops and coaching that expanded and strengthened volunteer solicitation, improved messaging, and helped produce a pledge drive that exceeded goal with increases in both total pledged dollars and number of pledges. (For complete pledge-drive metrics, campaign activities, and communications, please see the separate Year-Round Stewardship Committee report.)

Looking ahead, we will sustain the culture shift by revitalizing the Legacy Society through a two-phase relaunch: a June 6 fact-finding session with key stakeholders, followed by an operational restart and a multi-month, one-on-one stewardship effort to clarify donor intent and rebuild momentum in planned giving.

Submitted by: Brian J. Lasher, Chair, Financial Sustainability Team

Human Resources Committee

The HR Committee operates as an advisory team to the Minister with ongoing members Deborah Garskof, Sharon Poole and Kim Fuchs (Chair 2025-2026).

The HR Committee's priorities for the 2025-2026 year included:

- Supporting Transitional Minister Carlton E Smith as he worked with us for his 12-month term
- Following up on CT required sexual harassment prevention training for employees.
- Working with Accounting Manager annually to review benefits programs to ensure that the summary of benefits and cost-share for benefits programs is completed by UU Westport's Accounting Manager prior to the close of open enrollment period in November / December of the UUA's plan year.
- Updating employee's paid time off programs, to reflect UUA guidelines and current labor practices. This included updating the Employee Handbook for paid vacation and sick days.
- Updating a performance evaluation template for staff evaluations. The HR Committee supported Rev Carlton's efforts to provide an annual written performance evaluation to staff.
- Providing a comprehensive compensation review of UUWestport pay levels and roles, in coordination with UUA guidelines on compensation
- Working with Rev Carlton, Sue O'Meara and the members of the Finance Committee to plan a transition for Accounting support, from a regular employee role to a part time contractor role
- The HR Committee's Charter was updated to reflect its advisory role, and Committee will continue to act in an advisory capacity to the Minister and Board as needed.

Provided by Kim M Fuchs

Operations Council

In the Fall of 2025, the UUWestport Board & Governance Committee charged 4 Board appointed volunteers to **“assist the UUWestport Board, Senior Minister and staff with the planning and management of administrative/operational responsibilities and tasks; to oversee day-to-day operations** and support selected UUWestport committees in their work including setting and implementing operational policies”.

It's been a busy 10 months! We first focused on UUWestport's biggest need...managing the maintenance & repair of the building & grounds. The Operations Council oversaw key projects with contractors, including:

- Metal railing repair along the upper balcony
- Cracks in the sanctuary's new concrete floor and faulty trench heaters
- Burst pipe & drywall damage in the Meeting House over the winter
- Commercial dishwasher replacement in the Lundy kitchen
- Wood girder repair from insect damage
- Installation of a ductless HVAC system purchased by the preschool
- Maintenance & certification of the fire protection systems

While we are building up a Buildings/Grounds team, the Ops Council also tackled hands-on repairs such as:

- Replacing flagstones along the front patio/walkway and Meeting House
- Designing/installing 3 new road signs pointing to our location
- Repairing potholes along the exit road on the west side of the building
- Insulating the windows & doors of the preschool for the winter
- Cleaning up leaves in the Memorial Garden
- Removing a wasp nest near the preschool
- Repairing and cleaning up numerous projects by Jim Cooper
- Maintaining and repairing the chairs in the sanctuary

Looking ahead, as we continue to enhance the legacy of our beautiful Lundy-designed building, we hope to support the work of UUWestport committees as needed. New ideas include:

- Building up a strong Volunteer Brigade to help out as needed. **Please email us & join!**
- Developing a maintenance plan for each month across all building/ground needs

Deepest thanks to Amy Feinman for contributing as an adjunct member. Our heartfelt thanks to Ruth Fontilla, our Congregational Administrator, for facilitating all the work and keeping our volunteer team focused. None of this work would be possible without their on-site presence, coordination and follow up. And our best wishes to our most impactful team-mate, Jim Cooper, on his journey to a full recovery!

Respectfully,

Randy Burnham, Ben Chan, Jim Cooper, Scott Seo

Right Relations Team

The Right Relations Team, commissioned by the Board in 2024, initiated a Congregation wide covenanting process. For this work to continue, under the Minister's supervision, the Team will seek the input, experience and support of the new minister. The work is currently on hiatus but the promises we make to each other continues in the hearts and soul of UUWESTPORT. At the appropriate time we look forward to continuing our work.

Ken Vernon, Linda Lubin, and Randy Burnham

Settled Ministerial Search Team

Timeline May 2025 – April 2026

- Team retreat with UUA contact Christine Purcell
- Covenanting as a Team, learning about consensus models
- Familiarity with the UUA Ministerial Search Handbook
- Create Poster of the Search Timeline to post in Coffee Hour room
- Congregation completes UUA survey
- Congregation completes UUWestport Search Team's survey
- October is the month of Cottage Meetings and a special Staff meeting
- In November the congregation completes B4 survey
- Team meets Rev. Christe Lundsford via Zoom
- B4 Workshop on Anti-Bias Training
- B4 Sermon by Rev. Christe Lundsford
- We write Congregational Record
- We write pre-candidating questions and divide questions into sections by team members
- Reading Ministerial Records from applicant submissions
- Interview the Applicants via Zoom
- Narrow down the applicants to top three choices
- Bring top 3 candidates to Westport for Interview Weekends which includes a Vespers service, meals, transportation, and the interview
- Submit our ranking to UUA
- News of no match
- Contract to Call search begins with three Board members and three Search members

We gave weekly search moments...we shared many meals together...hosted coffee hour...maintained presence in foyer...placed articles in Soundings

Respectfully submitted, Chris Aquino, Cheryl Dixon, Jamie Forbes, Tom Hearne, Bob Perry, Elena Rockman, Emily Sherwood, David Smith, Phil Thomas

Treadwell Gift Committee

The congregation is the beneficiary of a bequest from Nancy J. Treadwell, which provides approximately \$800,000 in two equal gifts. The trust's stipulations direct one portion toward the Church School in memory of Mildred E. Treadwell, and the other toward the Karl M. Chworowsky Library in memory of Nancy Treadwell's parents, Thomas and Mildred Treadwell, who were founders and supporters of the congregation.

The Treadwell Gift Committee was established by the Board of Trustees to oversee the process of determining how and when the congregation will disperse the Treadwell funds and for what purpose. The committee's charge is threefold: to develop recommendations to the Board leading to proposed resolutions for a congregational vote, to educate and inform the congregation about the process and considerations involved, to keep the congregation informed and to seek appropriate feedback from the congregation at the right time.

The members of the Committee are Randy Burnham, Sean Feuer, Diane Melish, Sharon Poole, Cindy Potter, Joyce Thomas, and Bob Welsh.

The committee is currently in a research and preparation phase, building shared knowledge around historical context, legal and ethical obligations, and potential endowment structures.

Respectfully submitted,
Sharon Poole, Treadwell Committee Member

PROGRAM COMMITTEES

A Better Man

This covenanted group has been meeting since September 2017 – almost 9 years. We meet monthly on the 3rd Saturday of every month at 8am. Our purpose remains personal growth, connections, service, and aspiring to be better men and better people. A topic is formulated monthly by the leadership team, and each member is able to share their personal experiences in as deep a manner as they wish. Our group has found value in continuity and has been meeting during the summer months as well. Attendance has remained steady, between 12-16 men per meeting. In our circle, we allow plenty of time to share and bond. Based upon the committed membership, the group has successfully provided a forum for members that fills a gap that provides close male connections and friendships in contemporary suburbia. While the group has 24 long-term committed members, we would welcome anyone interested in coming to a group meeting to see if they are interested in continuing. We open up to new participants periodically, in the model of Small Groups. We prize stability within the group, to establish connection and trust. If interested, please email garvluke22@gmail.com.

Respectfully Submitted, Bob Perry Luke Garvey, Rob Laug and Jim Cooper

Adult Faith Formation (AFF)

The Adult Faith Formation Committee (AFF) was formed to provide educational and spiritual growth opportunities for the adults in the UUWestport congregation.

25/26 Offerings:

- Labyrinth for Spring Equinox - Marjorie Partch and Bart Stuck
- Sunday morning meditation - Janet Luongo
- Sunday morning chanting - Bart Stuck and Marjorie Partch
- Crossing Paths (adults and youth) - Hindu Temple, Mt Airy Baptist Church, Quaker Meeting House, Buddhist Monastery
- Climate Change presentation - David Emberling
- Compassionate Communication (5 sessions) - Steven Rosenberg, Denise Carreau
- Aleph Talks: Where Science and Spirituality Meet. Weekly class on Zoom - Bart Stuck and Marjorie Partch
- Washing of the Tears ceremony (with Mending the Sacred Hoop) - Grandmother Nancy
- Living the Path - applying Buddhist teachings to life (5 sessions on Zoom) - Nina Nagy
- Earth Day Environmental Justice panel - Jim Francek
- Our Whole Lives for Adults - Angi Haen, Randy Burnham, Ken Vogel, Ruth Fontilla
- Personal Finance Freedom - Rev Carlton Smith
- Living with Intention: a 5-week course on ethics, integrity, and well-being. - Nina Nagy, facilitator

Members: Jamie Forbes; committee chair, Cheryl Dixon Paul, Linda Lubin, Jenny Klein, Angi Haen, and Rev Carlton Smith

Caring Network

The Caring Network continues to support our congregation in tangible ways, offering rides, food, small gifts of thoughtfulness (often plants or flowers, but can be other small remembrances) and cards to folks who need or would otherwise appreciate our support during challenging times in their lives, for example, coming out of a hospital stay or dealing with the unexpected loss of a loved one. A notice about the network is at the bottom of Soundings every week so people can access it easily.

There are 84 UU Westport members and friends who have signed up to be helpful if and when they can. This year, we were needed to provide rides daily for almost two months in the snowy winter to and from Norwalk and Yale-New Haven hospital. It is a credit to the generosity of our congregation that we were able to do this: for 50+ days, with over 100 rides scheduled and delivered reliably. For this occasion, we were also able to incorporate friends outside UU Westport who wanted to provide rides too. Simultaneously, we were providing meals to a longtime UU family working through a very difficult loss. Doubling up on requests and being able to meet both those needs successfully challenged our network's ability to respond. Happily, it met the challenge well, again thanks to our volunteers.

It is always so uplifting to hear recipients of our services share at the candle boat how much they appreciate our support, and how it strengthened their sense of community and love within UU Westport. It feels good to be part of a caring team that inspires, connects and acts in these tangible ways.

We welcome more volunteers and another person or two to help manage this service should it be of interest; please contact Beth to find out more.

Submitted by Beth Cliff

Denominational Affairs

As a Unitarian Universalist congregation, we are under the umbrella of our larger faith association – the UUA.

The UUA holds General Assembly (GA) in June – either in person and/or virtually (since Covid) and is the largest assembled gathering of UUs that occurs once a year. As well as business meetings and voting on issues, GA offers classes, panel discussions, a variety of worship, remembering beloved leaders who have passed. When in person there are booths of books, chalices, flags, banners, stickers, bumper stickers, clothing, lawn art – all with a UU message. There are plenty of opportunities to meet up with old friends and make new ones. Consider attending a General Assembly and prepare to deepen your faith.

The UUA creates our hymnal, produces high level educational programs and many interactive online sessions. Spiritual Leadership under the UU Institute is one place to find good classes. The UUA connects us with ministers when we are in search. During Side With Love events, we can express our desire for social justice in greater numbers than just our own congregation. <https://uuinstitute.org/courses/spiritualleadership-305/>

The New England Region (NER) is our regional grouping of congregations. These leaders run courses throughout the year on stewardship, provide support for office Administrators of our individual congregations, lead in depth discussions for congregants who want to delve deeper into important topics with other UUs. They are there to help us grow and flourish. <https://www.uua.org/new-england>

Respectfully submitted by Cheryl Dixon

Membership Committee

Numbers: 50 people filled out visitor cards this year, and 16 people signed the book to become members of the congregation.

For 2025-2026

Beginning of Year: **373** (as of May 28, 2025)

Additions: **16**

Losses: **5**

End of Year: **384** (As of May 27, 2026)

This year, we ran newcomer orientations in the Fall and Winter (no one signed up for the Spring). They consisted of three sessions followed by a potluck. The membership easel is out every Sunday and upcoming newcomer events are posted under it. We made an addendum to the directory with photos of newer friends and members, provided handouts and information for our table at Halloween on the Green, and worked with the hired consultant on approaching newcomers for pledging and donations. Outreach was one of our goals this year and to that end, we have been working closely with COM to plan *Fun Fest*, a festival for the larger community this coming fall.

Respectfully Submitted by Jerusha Vogel, Membership Chair.

Other Membership members include: Chuck Colletti, Eileen Belmont, Rob Zuckerman, Dale Kutnick, David Keeton, Kathy-Jo de Vos, Ali Alzabidi, Denise Carreau, Tim Largier, and Steve Rosenberg

Memorial Garden Committee

The Memorial Garden was dedicated on October 15, 1972 by Rev. Ed Lane as a sacred and peaceful resting place for the ashes of members and their families. We are responsible for policies and records and assisting with site selection in the Garden or on the Memorial Wall.

This past year we had the honor of interring the ashes of Victor Lundy, the architect of our inspiring building, and Rev. Frank Hall, our beloved Minister Emeritus.

Sincere thanks to David Thompson for his financial gift specified for the upkeep of the Memorial Garden. Thanks to Bob Perry who has been our site preparer for several years and to David Raymond who is always willing and able to come to the rescue! Thanks also to Ruth Fontilla for her frequent assistance.

It is an honor to assist members to plan for the future or to help during the grief of a loss.

Respectfully submitted by Diana Bell.

Pastoral Care Chaplains

The Pastoral Care team consists of fourteen chaplains trained to provide emotional and spiritual support to members of the congregation.

While in recent months few congregants have requested that a chaplain be assigned to them, a lot of pastoral care has been happening in the congregation by members supporting each other and through the work of the chaplains. On occasion, specific situations come up which require more delicate handling, which the chaplains are trained to provide.

We continue to monitor the candle boat process to keep it flowing smoothly and to stay attuned to congregants' needs.

The chaplains meet monthly to deepen their training and to provide support and guidance to each other. This year, as part of our ongoing training, we have been reading Mark Nepo's book, *Surviving Storms*.

We look forward to continuing a rich pastoral care relationship with members of the congregation.

The Pastoral Care Leadership Team: Rev. Jim Francek, Beverly Bailey, Marie-Claire Bue, Tom Hearne and Ravi Sankar.

Respectfully submitted by Marie-Claire Bue

PR and Social/Digital Media

As with last year, there has been no one person who is responsible for managing outgoing messaging to the public about specific events and activities at UU Westport. However, Beth Cliff volunteered to help out when she could. This included setting up weekly notices about our services in the local community Patches, and on Instagram and Facebook, so interested people would have a way of knowing when we meet and what activities (family faith formation, OWL, nursery-care, worship) are available to them, and how to access them. She has also posted regular articles of interest (often UUA related) and candid, inspiring photos from services and UU Westport activities to generate interest for the public, and so that members can then share among their personal networks to spread the news.

This year there were "one-off" other occasions for distributing our news publicly: Rev. Carlton's appointment in May and arrival in August, the Glass House concert in October, the Christmas Eve service, both the Bethany Yarrow and Yale Alley Cats concerts, the Tag show, Art Show, Online Auction, special musical guests for Sunday morning, and more. In these instances, Beth worked alongside staff and organizers to get information out to the public in time for them to join us. Because she has worked with media in the past and has built up relationship with outlets in the area, it was fairly easy to do, but it can be time consuming. She is grateful to Jenny and Charles Klein for updating messaging on our website homepage and photo carousel as needed, and to Kim Fuchs who has collaborated and shared and worked the broad network of relevant media contacts given her PR work under the Voices Café umbrella.

Next year, between the Operations Council and the Volunteer Brigade, we hope we can lay out a consistent approach for handling special event advertising especially. The weekly notifications about Sunday services are predictable and manageable and can easily be pulled from pre-existing materials; it's the large "one-off" events that can take considerable time. In addition, some \$\$ funding could broaden our exposure, and having several people skilled on this would be useful for everyone.

Social email. Our social email group (UUWestportsocial@groups.io) continues to thrive, although we have not advertised it much this year - there's just a lot going on these days. This group allows congregants to share information directly with each other across our membership group, rather than having to go through the formal minister and staff hierarchy for editing or approval. The topics can be varied and may be outside spiritual or UU Westport-specific subjects. Guidelines are on the website and the site itself, and the emails are lightly monitored. There are 116 members in the group; many are people who like to share together online, but for philosophical or personal reasons, don't want to be part of traditional social media platforms. Currently it is an opt-in service.

Submitted by Beth Cliff

Safer Congregation Committee (SCC)

The Safer Congregation Committee (SCC) has been a minister-appointed committee, currently composed of two mental health providers, a nurse, an attorney, a youth health and safety specialist, our Faith Formation leader, and Head of Ushers. The SCC has advised regarding issues of safety within the Lifespan Faith Development curriculum, staff, volunteers, and Pastoral Care associates. Safety issues ranged from physical safety within the building to mental health and sexual impropriety within congregants/staff in the congregation.

Our meetings discussed topics centering around mental and sexual health, safety planning, and staff/volunteer trainings. We continued revising the SCC protocol and guidelines, including the Family Faith Formation policies.

After much deliberation, and senior ministry changes, we decided to discontinue the committee, or until the next minister is in place. Some of our work has been transferred to other committees, such as congregational disruptive behaviors which was transferred to the Committee On Ministries (COM). Meetings with COM were held to discuss this transition. We have suggested that the Mental Health trainings to staff, volunteers, and Pastoral Care associates be incorporated within Pastoral Care. Finally, physical safety within the building will be addressed by the Operations Council or Building Management committees.

This past year we have continued connecting with local agencies such as Domestic Violence Crisis Center (DVCC), and the Westport Police Department (WPD). We advocated and planned for WPD presence at two events (Seder and Bethany Yarrow's Sing-In). We continued discussing the WPD's recommendations for Safety within the UUWesport buildings, which have not been a priority with the Board. Mid-year we had a Digital Safety Training Workshop by DVCC, and in March 2026, we conducted a successful Evacuation Drill.

For the 2025-2026 year, the members have been: Wendy Levy, PsyD (chair) Rev. Carlton Smith, Deborah Garskof, Esq, Angi Haen, Jay Lubin, Leslie Cenci, Amy Feinman, and Miki Lasher, PhD.

Shawl Ministry

Between June 1, 2025 and June 30, 2026 twenty handmade shawls were given to members of our community to serve as a tangible source of concern, support, or celebration during times of significant personal transition.

Again this year we provided hand-knit scarves with new hats to all kindergartners at Beardsley School in Bridgeport. They were delivered on my 75th birthday and the children were excited to sing "Happy Birthday to Miss Jan" followed by the usual "Are you one, are you two, are you three" and I knew everyone would definitely miss lunch at least. Fortunately, the highest number imaginable was 24 and it was the most delightful present ever!

For Super Bowl Sunday our group made three soups (vegetarian, vegan, and hearty) to sell to benefit Rev. Carlton's discretionary fund. Unfortunately, the service was cancelled due to extreme cold. The vegetarian tomato soup and the hearty ham and pumpkin soup were frozen in take-out containers and donated to the Youth Group to sell to raise money for their service trip to Chicago in April. They did such a great job in raising \$300, and were profusely grateful for our contribution. Freezing was not advised for the vegan quinoa soup so it was donated to the Gillespie Center in Westport.

One of our members participated in the Knit for Food Knit-a-thon fundraiser at The Westport Library. The Shawl Ministry voted to donate \$200 to be equally split between the four benefitting charities: Feeding America, World Central Kitchen, No Kid Hungry, and Meals on Wheels.

We continue making loans to women entrepreneurs in developing countries world-wide through Kiva.org. (This year we made 6 new loans using repaid monies. We have \$285.15 in outstanding loans. The total amount loaned since 2007 is \$8,975.00 to women in 70 different countries.)

Respectfully submitted, Jan Braunle, Facilitator

Social Justice Council (SJC)

The Social Justice Council (SJC) began the 2025-26 church year with a twofold mission: to support and to collaborate with the council's 11 social action committees when needed and to act as a unified council with one voice in promoting our UU values to our congregation and to surrounding communities. The council began in August with a sense of urgency; our UU value which declares every person is inherently worthy and has the right to flourish with dignity, love and compassion had been and continues to be seriously challenged in our communities today. Therefore, the SJC voted to focus on immigration as the council's main priority; we encouraged activism which included rallies, organized food distributions, legislative advocacy and other supportive measures which you will read about in the committee reports below.

We also desired greater transparency and thus opened the SJC meetings up to anyone interested in attending. Lastly, we developed a process to inform UUWESTPORT newcomers about the council and invite their engagement and participation.

We appreciate the wisdom and guidance of Rev Carlton E. Smith along with his presentation on noncooperation. Rev Carlton will be greatly missed.

Respectfully Submitted, Leslie Cenci & Pat Francek, Co-Chairs

SJC: Beardsley School Committee

The mission of the Beardsley Committee--*to have a significant and tangible impact on the lives of children in the Beardsley School community*—continues to guide our work at our adopted elementary school in Bridgeport.

Each year new challenges arise, yet we not only continue, but also expand traditional activities and events: workshops in foundational literacy strategies for reading tutors; Read Aloud Days in Oct., Dec., and May providing readers and books for classroom libraries; Career Day presenters at every grade level in March; science fair judges, music classes, and hand-knit scarves and hats to kindergarteners; funds for back-to-school/end-of-year experiences, Thanksgiving turkeys, and generous holiday gift cards in December; speakers and presenters including Grandmother Nancy and the Fairfield Women's Basketball Team; field trips to the renovated Peabody Museum in New Haven and the Pequot Library in Southport; monthly meetings with the School Governance Council as a Community Partner; book giveaways at parent events; and a promising new Garden Club.

A particular challenge this year was responding to the loss of the teacher librarian staff position. Roadblocks occurred until Jan., when library volunteers created a process allowing 4th – 6th grade students access to the library's collection. If the district's elimination of school librarians continues next year, we will attempt to also bring Pre K – grade 3 classes to the library for regular book check-outs and returns.

We remain extremely grateful for the steadfast, enthusiastic, and generous support of our UUWestport community.

Your Beardsley Committee, Sari Bodi, Beth Cliff, Audrey Heneage, Lynne Laukhuf, Diane Melish, Diane Moller, Anita Pfluger, and Kathy Roberts

SJC: Black Lives Matter Committee

The mission of UUWestport's Black Lives Matter committee is to raise awareness of the historic roots of systemic racism and its present-day institutional impact within our country; inspire individual reflection, activism and collective action; build alliances with community-based organizations which center those marginalized by systemic racism, and work together towards a more just and equitable society.

BLM collaborations within the Social Justice Council included the following: support of UU the Vote and Legislative Advocacy Committees by writing postcards, calling and texting voters, calling and writing legislators, and attending rallies. We supported Reproductive Justice in raising both awareness and funding for Doula training. Together John Street Bridge and BLM spearheaded the congregational food drive for Thanksgiving that went to the Bridgeport Rescue Mission.

In October we highlighted our BLM Banned Books Cart to promote freedom to read and access information without restriction. We took part in a Banned Book Workshop offered by B'nai Israel Temple and promoted a local bookstore carrying banned books.

Regularly, through Soundings, our team alerted congregants to various talks, exhibits, books and museums with critical information on racism. We encouraged actions to support and strengthen civil rights in this political environment.

We developed a donation drive in UUWESTPORT to offer enrichment opportunities through Wakeman Boys & Girls Club for children from PTBarnum housing who have limited access to opportunities. As a community partner, we participated in Bridgeport's #100GirlsLeading Summit, a day of interactive mentorship for underserved girls ages 9-18.

Respectfully Submitted,

BLM team: Pat Francek-Chair, Teryl Eisenberg, Kristin Trost, Beth Dobseavage

SJC: Gender Equity Team (GET)

The Gender Equity Team (GET) has had a vibrant and impactful year, deepening our congregation's commitment to inclusion and advocacy for LGBTQIA+ individuals and communities.

A new Progress Pride flag was installed on Lyons Plains Road, offering a visible symbol of welcome to all who pass by. We continued our legislative advocacy work, equipping congregants with opportunities to submit public comments and support more inclusive policies, and many rose to the occasion.

Our partnership with Triangle Community Center (TCC) remained a cornerstone of our efforts. Community Education Director Cadence Pentheny (we/they) spoke to us about the state of LGBTQIA+ rights, and we responded with a collection of coats, clothing, blankets, and Dunkin' gift cards to help community members through the winter. Our Shawl Ministry crafted a handmade shawl in gratitude for this ongoing partnership. The congregation voted TCC as a Share the Plate recipient, raising \$1,655, and in March 2026, TCC Board President Ari Linder (they/them) addressed our congregation directly.

Culturally, our team fostered meaningful community connection. Congregants gathered at Obodo Serendipity Books in Stratford for a discussion of Lester Fabian Brathwaite's *Rage: On Being Queer, Black, Brilliant . . . And Completely Over It*. We also screened Imara Jones's 2025 Ware Lecture on defending trans lives and democracy, sparking lively conversation. A congregant group attended a screening of *A Culinary Uprising: The Story of Bloodroot*, a film about a pioneering queer vegan restaurant, shown at Joylark, a restaurant owned by one of our congregants.

Finally, we proudly sponsored a booth at Pride in the Park in Norwalk last June, sharing UU Westport's values with the broader community.

Respectfully Submitted by Pam Einarsen

SJC: Intercultural Development Inventory (IDI)

The IDI is a tool to assess our ability to connect across difference. It's a first step in understanding where we, as individuals, are starting from, so that we can then work to effectively develop our intercultural competency skills

as individuals and then in community as a congregation. In IDI's classes we learn that each of us has aspects of every part of the mindset spectrum within us and depending on trauma and circumstance we can show up very differently along our life's journey.

The IDI can be a useful tool as teams and committees at UUWESTPORT change membership. Grounding ourselves in our own stories first, sharing our stories with others in our groups, and then bringing our new skills to the rest of the congregation and the wider community.

I invite you to contact me to find out how IDI can support your team's vision and mission. Building intercultural competence is IDI's goal. We will continue to offer the IDI yearly to congregants who would like to participate.

Respectfully submitted,
Cheryl Dixon, Qualified Administrator of the IDI

SJC: Immigration and Refugee Outreach Committee

For many years, we and several partner congregations worked with the Connecticut Institute for Refugees & Immigrants (CIRI) to prepare homes for refugees arriving in Connecticut. After the Trump Administration announced an indefinite suspension of the U.S. Refugee Admissions Program on January 20, 2025, we looked for new ways to support CIRI clients and other immigrants. In response, the CIRI Apartment SetUp Team (CAST) created I-ACT (Interfaith Action Coalition Team), bringing together volunteers to advocate for immigrant, refugee, undocumented, and underserved neighbors. In addition to advocacy, I-ACT offers opportunities to connect with CIRI and other organizations through hands-on service and social engagement.

We served as Community Sponsor for Make The Road Connecticut's July author event at the Westport Library. Cristina Jiménez, author of *Dreaming of Home: How We Turn Fear into Pride, Power, and Real Change*, spoke about her path to U.S. citizenship and ways we can support efforts to resist harmful anti-immigrant policies.

In December, we welcomed Our Woven Community to UUWESTPORT to sell their beautiful handmade items. This group of refugee women learns sewing skills to create distinctive handbags, scarves, and other products. All proceeds go directly to the artists and help cover program costs.

On February 10, we joined HUSKY4 Immigrants, CT Students 4 A Dream, and other organizations at the Health Justice NOW 2026 campaign launch at the State Capitol.

Melanie Wyler and Kathy Roberts, Co-chairs

SJC: John St. Bridge Outreach

Connect. Our Outreach coordinates with April Barron of Helping Hands Outreach, Inc. in a servant leadership model. April Barron, a grassroots activist in Bridgeport, coordinates a Sunday food-share for unhoused and food-insecure individuals under the bridge (Route 25 connector) on John Street in Bridgeport.

Members of our congregational community have made bagged lunches for the Bridgeport community every week since April of 2020. These lunches open the door to our connection with the community, satisfying a physical appetite as well as a deeper (mutual) spiritual appetite. We bear witness to their lives and we share stories. Our congregational community donates diapers, clothing, shoes, and personal care items as needed.

Act and Impact. The number of weekly bagged lunches fluctuates, but averages 90, decreased from last year. There are a few dedicated members who have made lunches every week since April of 2020, and other members who frequently make lunches. We have served approximately 49,376 total lunches as of May 25, 2026.

We serve lunches to the community on John Street and in various locations in Bridgeport, and to four half-way houses for men returning from incarceration.

Since 2024, our Teens have also periodically served hot coffee and lunches on John Street, and handed-out clothing, socks, and other essential items.

We held our annual Backpack/School Supply and Holiday Toy Give-Aways in partnership with April Barron and Save Our Babies, Inc., an organization mentoring at-risk-youth and providing them with opportunities for the future.

Respectfully submitted by Teryl Eisenberg

SJC: Legislative Advocacy

The Mission of our Legislative Advocacy work is to engage in the transformative work of social justice by working with impacted communities to change laws in Connecticut and put our faith into action.

We engage in targeted outreach. Members of the congregation are organized so that you are contacted when there is a need to reach out to your representative.

In the 2026 CT General Assembly our focus was on immigration. We worked in statewide coalitions and passed SB973 which, among other things, creates 'protected areas' from immigration (ICE) enforcement such as schools, hospitals, social service agency facilities and houses of worship — where people cannot be arrested solely on the basis of a civil offense, such as an immigration violation; bans agents from wearing masks; allows citizens to sue for constitutional violations; and limits use of automated license plate readers.

We were unable to expand HUSKY health insurance beyond age 15 for non-citizens who don't qualify for Medicaid or CHIP insurance due to immigration status.

David Vita

SJC: Mending the Sacred Hoop (MSH)

MSH Purpose: To create educational processes for our congregation that raise their understanding of the history, struggles and current challenges (e.g. social justice & social welfare) of our native population; and to engage congregants in offering practical support in ways identified by them.

The active members of MSH include Grandmother Nancy Andry, Jenny Klien, Rev. Jim Francek, Joseph Many Horse Davis and Danielle LeBlanc.



During the '2025-'2026 Church year, we have created the following opportunities for expanding our congregations understanding of the customs, spiritual practices and challenges of our indigenous people. We meet on zoom on a monthly basis.

- August, 2025: Grandmother Nancy accompanied a number of our congregants to the Mashantucket Pequot Tribal Corn Pow Wow where she facilitated an in the moment teaching circle.
- January, 2026: MSH facilitated a washing of the Tears ceremony to support congregants through their personal or communal loss & trauma experiences.
- February, 2026: Grandmother Nancy & Jim invited Bethay Yarrow, Francine Wheeler & Gordon Titcomb to lead us through a community sing along experience in support of the people supporting immigrants under fire. We raised almost \$1500 that was passed on to programs in Minneapolis and Stamford.
- April, 2026: Grandmother, Pat Francek, Linsey Hennesy and Jim created and facilitated an Earth Day Service highlighting Earth based spirituality for our congregation.

- May, 2026: Grandmother Nancy, Jenny Klien, and Jim crested an exhibit reminding our people of the continuing challenge our Indigenous people have with the murdered and missing women.

Submitted by Grandmother Nancy Andry and Rev. Jim Francek

SJC: Share the Plate

These recipients were voted on by our congregation at our 2025 Annual Meeting and the following received the highest votes:

July 2025	REACH Fund of CT, Nwlc.	\$859.00
August 2025	Laundry Love, Bpt.	\$691.00
September 2025	DomesticViolenceCC, Stmfd	\$1,795.00
October 2025	Make The Road CT	\$1,016.00
November 2025	nOURish BRIDGEPORT, Bpt.	\$2,751.00
December 2025	Helping Hands, Bpt.	\$2,071.00
January 2026	Reach, Norwalk	\$2,048.00
February 2026	Homes With Hope, Wstpt.	\$ 868.00
March 2026	Triangle Comm. Center, Nwlc.	\$1,655.00
April 2026	Beardsley School, Bpt.	\$1,043.55
May 2026	Mercy Learning Center, Bpt.	\$1,060.00
(Subtotal to date:		\$15,857.55)
June 2026	Madaras Women Veterans, Bpt.	\$

Respectfully submitted, Cheryl Dixon, Social Justice Council

SJC: Reproductive Justice

The Reproductive Justice Committee has been active in various ways this past year. We have supported UUtheVote in writing postcards. We have provided written testimony supporting HB 7214, Maternal Health and 7213, Youth Access to Contraceptive and Pregnancy Related Care and spoke up about extending the Shield Law in Connecticut. One of us met with Sierra-Marie Gerfao, UU Public Theology Minister and part time UU minister in Danbury to learn more about a statewide Social Justice Council and hosted a meeting/"potluck" the evening before she delivered a Sunday sermon to our congregation. We are considering contributing/joining this council as a congregation.

One of us attended a 2 ½ day workshop in Philadelphia by "AllAboveAll", a US based, women-of-color reproductive justice organization and coalition dedicated to ensuring abortion care is accessible and affordable for all, especially those disproportionally affected by systemic inequities. Cynthia Hayes from Doulas4Ct and Kirill Staklo and Eliot Olson of Trans Haven/Peer Pride were also in attendance. We hope to continue these relationships and anticipate having Cynthia and several other doulas do a presentation in the fall on what a doula does "hands on", to support the pregnant, birthing, lactating person.

We supported the nomination of The REACH Fund of Connecticut for STP for January and held a workshop on "ER Contraception" and put together 150 kits which the organization distributed throughout Connecticut where young people gather. We kept several for our own distribution and will try to provide these kits in the bathroom baskets of our UU buildings. In February, seven of us went to Hartford to support Husky4Immigrants at the start

of our Ct. legislative session. We continue to attend the Westport/Weston DV Task Force meetings and anticipate joining "Abortion Access Advocates" of Repro Equity Now. Several "abortion centered" themed plays may be shown at the Westport Country Playhouse which we hope to support in July.

Submitted by Leslie Cenci

SJC: UUtheVote

Postcards: About 10% of the congregation wrote 990 postcards to swing states (AZ, GA PA VA) with information on issues and how to vote. We are blessed to have a generous donor of stamps!

2025-26 RALLIES: UUs attended "No Kings" rallies in cities across CT, NY & nation. The March 28 No Kings Protest drew thousands to CT. Organizers planned 3300 events nationwide with 8 -9 million total protesters. Some of us follow Indivisible and podcaster, Jessica Craven.

We meet every Mon 10-11 am ReSistersCT.org to discuss and plan actions. Every Wednesday 5-6 pm Resisters, Mistresses & friends gather at the Norwalk bridge over I-95 exit 16 to display a version of our message: "Defend democracy, Resist autocracy." The honks of approval are uplifting! To check us out, tune in to our Monday morn 10 am meeting. Contact me for # for ReSister leader, Vicki Volper.

We inform citizens in other states about candidates and positions and facts in upcoming elections such as the general election in CT for governor on November 3, 2026. To stay informed check out www.vote.org.

On the first Sunday of every month, UUs & friends are invited to meet for a ReSisters Activist Afternoon on the Post Road in Westport. We bring lunch and then may write postcards, or letters to the editor, or we make calls. We share our experiences of knocking doors, and other ways we choose to save Democracy.

UU the Vote & Social Justice leads - we hope to see you on the bridge or at the next protest. Or hear about a call you made to your legislator or our governor, or any other action you took that made even a small impression.

We work so our children and grandchildren will enjoy the continuing blessing of living in a democracy!

Submitted by Janet Luongo, Lead of UU the Vote. Along with Kathy Roberts, Jamie Forbes, and Sari Bodi

SJC: Voices Café Committee

Voices Cafe's Fall 2025 concerts included Caravan of Thieves, Emma's Revolution, and On The Trail. Voices Cafe Committee members also supported SJC's Spring 2026 concert with Bethany Yarrow, under the Mending the Sacred Hoop Committee sponsorship. Voices Cafe's three Fall 2025 concerts generated a total of approximately \$3300 in net income to be put towards ongoing UUWestport Social Justice efforts.

These Fall 2025 concerts followed the prior year's successes, featuring some sold-out shows, and strong visibility for its artists and social justice mission. However, the 2025 - 2026 season of Voices Cafe ended with a pause in operations as of December 2025.

The decision to pause booking concerts for 2026 was based on adjusting to the resignation of the Voices Cafe Chair and the challenges of operating the Fall 2025 season through the collaborative efforts of committee members without a Chair. Because no Chair has stepped forward and Voices Cafe has received sporadic support from the full UUWestport community, Voices Cafe has not booked any further concerts as of December 2025. Getting to "pause" involved committee meetings in late 2025 and early 2026, as well as an informal review with the Board regarding Voices Cafe's need to suspend show bookings due to a lack of leadership and clarity on its role and partnership with the Social Justice Council. The committee continues to be on a "pause", and anticipates continuation of this suspension at least for the balance of the 2026 calendar year.

Submitted in collaboration by: Kim Fuchs, Jon Gage and Bruce MacNair on behalf of the Voices Cafe Committee.

SJC: Westbridge Coalition

Since 2008, Westbridge (WB) volunteers have repaired and renovated over 150 homes in and around Bridgeport for low-income families and community organizations. Our clients are often elderly, disabled, single moms, widows, or vets who need warm, dry and safe home. All materials and labor are free to those served, thanks to the support of local churches and individuals. Jobs include fixing leaks, updating bathrooms, installing floors, patching sheetrock, and building wheelchair ramps. Volunteers from all walk of life meet once or twice a week as they are free.

If you want to help out with housing, work with a group of good people, and work with your hands, consider joining us. Contact me at mark.corcoran@hotmail.com.

Respectfully submitted by Mark Corcoran

Soul Matters

Soul Matters is a valuable program that helps Unitarian Universalist congregations connect around monthly themes. These themes inspire reflection, conversation, and growth through worship materials, music, and small group discussion guides. Our congregation has a long history of activating the small group process as a way to deepen a sense of spiritual growth within congregants. Our Soul Matters experience has demonstrated its strength in creating meaningful conversations that lead to meaningful connections.

Currently we have five active groups led by Randy Burnam, Ruth Fontilla, Kim Fuchs, Sari Brodi and Lynne Laukhuf. These groups meet both in person and on zoom at different times. All follow a discussion format suggested by Soul Matters. One of our groups is a writing group. Over this past year I have served as the facilitator of the leaders monthly meeting. Currently we have six congregants who have expressed an interest in joining this effort (hopefully) next fall. We have plans for starting a new group following our Sunday Service once a month.

Respectfully submitted, Rev. Jim Francek, Community Minister

Soundings and UUWestport.org

It has been a topsy-turvy year for the web site team (Charles Klein, Jenny Klein, Ruth Fontilla, Eileen Belmont, Peggy Gormley, and Chris Campbell). A more concise and cohesive navigation was designed. An updated, new look and feel for the overall site and - particularly - the home page was designed. In terms of the amount of time and work accomplished, we really did turn a corner. However, the team had to stop focusing on the "new" site and turn attention back to the present site.

The present iteration of UUWestport.org is based in a woefully outdated version of WordPress that is no longer supported, and is not mobile friendly. However, in an effort to help the site run more smoothly, the team weeded out of *A LOT* of old and no longer needed web pages and posts. You might have noticed how items have been shifted around and the home page no longer requires you to scroll down as much to see everything. The menus have also gone through some edits.

Presently we are working on upgrading all forms on the site. The previous GravityForms were no longer working appropriately and we have installed WSForms. WSForms not only is far more up-to-date, but offers far more functionality. We have weeded out the number of forms as well. Presently, the new forms are being put in place.

There are plans to create a new version of UUWESTPORT.ORG, hopefully addressing all the wonky issues that have dogged the website for decades.

SOUNDINGS - our newsletter - covers items and events officially endorsed by UUWestport. These include, but are not limited to Sunday Services, Faith Formation and various social justice items that have UUWestport involvement. SOUNDINGS continues to be hurled at the masses on Fridays. The official emailing of SOUNDINGS is anywhere between noon and before 2:00 PM. The span of time is most often due to finalizing certain blurbs and/or the Order of Service.

The deadline for all blurbs is Wednesday by 5:30 PM. This gives time for the editors to post and organize all items and to send a preview to proofreaders to review.

SOUNDINGS will start its summer schedule of every-other-week starting June 20, 2026.

Respectfully submitted by Charles Klein, web elf

Tech Team

This past year has been one of recovery and renewed momentum for the Tech Team. After months of holding services in the foyer during Sanctuary construction, we were thrilled to return to our restored space in September. The transition back involved careful reinstallation of equipment and reconfiguration of our setup, and we're glad to be back where we belong.

On the technical side, Rob made significant improvements to our camera systems and worked with Oleg to establish fixed IP addresses for our cameras and other Wi-Fi-dependent equipment. This kind of behind-the-scenes infrastructure work makes our Sunday operations more reliable and sets us up for smoother streaming going forward.

Leadership and organization continued to be a team effort this year. A special thank-you to Regina, who helped keep the team organized and on track through another year of transition and change.

We're delighted to share that Erik and Fiona — two longtime audio volunteers whose departure we noted last year — have rejoined the team. Their experience and familiarity with our setup are a tremendous asset, and we're so glad to have them back. Erik has also taken on a mentorship role, training newer members and developing documentation to help everyone know what to do and when. That kind of investment in the team's future is invaluable. We are also deeply grateful for David, whose quiet dedication and sure-handed work behind the video console has been a steady heartbeat of our Sunday services week after week. We're also encouraged by the interest from newer faces: Jenny and Phil are among those who have stepped up to learn the ropes, and we welcome that enthusiasm.

Even with this growth, we can always use more volunteers to fully meet our Sunday tech and streaming needs. Remote participation remains an important part of how our congregation worships together, and having adequate team coverage ensures that no one is left out. If you're curious about joining, there's no experience necessary, just a willingness to learn. Please reach out and we'll provide all the training and support you need!

Submitted by Ruth Fontilla

UUWestport Women

UUWestport Women is a ministry for those who identify as women. Our goals are to provide a rich set of opportunities to support women's engagement in the UUWestport community, and overall to provide a variety of opportunities where women can build deeper relationships and nurture spirituality.



Our fifth annual Spring Fest took place on May 2, 2026. This event provided opportunities for healing, joy, and community. Workshops included: beaded jewelry making with Amy Feinman, Caribbean merengue dance with Arnela Ten Meer, Hypnotism with Denise Carreau, and Balance with Eileen O'Reilly.

Always valued are our monthly women's potluck dinners organized by Eileen Belmont. These monthly gatherings deepen our sense of connectedness. We meet at members' homes monthly. Our hosts this year include: Lia Albo, Eileen Belmont, Sofia Dumery, Eileen O'Reilly, Chris Place, Marie-Claire Bue, Sari Bodi, Sharon Poole, Linda Hudson, and Robin and Lynn Canter.

Denise Carreau spearheaded our first Galentine's Day celebration at JoyLark, member Jenna McPartland's restaurant.

For our Holiday Boutique in December, we sold jewelry and scarves donated by our members. Led by Sari Bodi, this event was a successful fundraiser with over \$4700 contributed to the congregation's operating budget. We will continue this in the first two weeks in December 2026.

UUWestport Women has served as a launching ground for the Black Lives Matter Committee led by Sudha Sankar and Pat Francek, and for UUtheVote, led by Janet Luongo, as well as the annual Career Day at Beardsley School. These groups are now part of the Social Justice Council. uuwestportwomen@uuwestport.org

Respectfully Submitted,
Sari Bodi and Elizabeth Macdonald, co-leaders

UUWestport Hiking Group

The UUWestport Hiking Group schedules hikes on the beautiful trails of CT from September through May. We also schedule some walks at Sherwood Island State Park during the summer months. Some of this past year's hikes were Bennett's Pond, Devil's Den, Saugatuck Trail, Trout Brook, Wier Farm, Crow Hill, and the Tonka Trail. We hike two times a month on the first Saturday and the 3rd Wednesday.

Our planning and leadership team: Dave Bue, Lindy Hennessy, Gian Morresi and Jamie Forbes

Unitarian Guys Night Out (UGNO)

UGNO is an acronym for Unitarian Guys Night Out. It was started over 20 years ago when several members of our congregation met at a pub in Fairfield to create a social connection outside of Sunday coffee hour. They started meeting each month and UGNO was born. Over the years there has been an ebb and flow of active members and meeting times. At this time, we have been meeting once every several months at various pubs throughout Fairfield County. Anywhere between 8 and 25 male congregants have been attending. This is an informal group with no dues or attendance requirements. The only requirement is to come when you can to enjoy some good cheer with your fellow male UUs. We have an email list and if you would like to be on the list which is used to announce an upcoming meeting send an email to perrybob66@gmail.com.

Respectfully submitted Bob Perry, Rob Laug and Dave Bue

Ushers

This was my first year as chair of the ushers; it started with the building construction and EW services. I used that time to organize myself administratively. Once we moved back to the Sanctuary a schedule was brought back for those who wanted a certain day each month. Currently we have more unscheduled slots than scheduled, 4 ushers a week is ideal. Fortunately, people volunteer every Sunday and we complete our tasks.

A few changes were made. I instituted usher seating in the back of the sanctuary. Reserved seats and large type Order Of Service are provided to 2 congregants with mobility issues. We have a hybrid Usher/Greeter as co-chair who always steps up to help. Finally, with large events we instituted seaters to help fill the rows efficiently.

I look forward to seeing new faces in the usher program and anyone interested should join.

Submitted by Amy Feinman, Usher Chair, with Kathy-Jo de Vos- Usher Co- Chair

UU Buddhist Study and Practice Group

We are Spiritual beings having a physical experience. As such, we are trapped in the realm of the physical with its plenitude of suffering. Our work involves around seeing the causes of our suffering and how to find degrees of freedom to being completely but surely released from bondage. This changes our relationship to life and the Spirit in a profound way.

Submitted by Nina Nagy

UU Movie Discussion Group

The main goal of our group is to connect with one another through our shared love of movies. Because we meet on Zoom, we are able to stay connected with a few UU's who have moved away.

From September through June, we meet on the last Friday of the month and discuss the movies we watched that month. Then we vote on 3 movies to watch the following month. Through our interesting discussions about the movies and sometimes, how they relate to our own lives, we get to know each other better. At Oscar time we again found that we had selected almost all of the movies nominated for Best Picture, including the winner, One Battle After Another. Other movies with Oscar nominations that we watched were Frankenstein, Marty Supreme, Hamnet, Train Dreams, If I Had Legs I'd Kick You, Sentimental Value, The Secret Agent, It Was Just An Accident and Blue Moon. Some movies were streaming and some were in theaters, and sometimes members of the group attended in-theater movies together.

Members were both lost and gained and we currently have about 12 active participants, plus a couple of people who asked to remain members to see which movies we pick. Here are the other movies that we saw in September through May: Downton Abbey: The Grand Finale, Hamilton, Warfare, Steve, Good Fortune, Nuremberg, Hedda, Jay Kelly, Sarah's Oil, The Rip, Wuthering Heights, Crime 101, Twinless, Project Hail Mary, Peaky Blinders: The Immortal Man, A Private Life, The Devil Wears Prada II, Remarkably Bright Creatures, and The Testament of Ann Lee.

Please contact me if you would like to join us: dorothyjeanrich@gmail.com
Dorothy Rich

UU Westport Players

The UU Players were founded 18 years ago by Jim Luongo, our esteemed director. During Jim's tenure we put on 18 plays with over 50 congregants performing - many of whom had never been on stage before - and another 10 serving in Stage Manager, Tech, and other roles. In addition to providing a great opportunity for entertainment and connection, the UU Players have raised tens of thousands of dollars for the congregation.

Jim Luongo announced his retirement from the UU Players last Fall and his last play was *The Gin Game* - a classic Pulitzer Prize-winning play by D.L. Coburn, featuring two nursing home residents who bond over Gin Rummy. The play deals with themes of aging, regret, pride, and a lifetime of perceived defeats.

After the play's run, we celebrated Jim's contributions with a Cast Party that included members from all the plays that he directed at UU Westport.

To pick up the mantle and continue the legacy of Jim Luongo, the UU Players Planning Committee (UUPPC) was formed last Fall. The Committee consists of Candace Clinger, Sarah Bell, Joann Coviello, Jerusha Vogel, and Tom Croarkin. Our first post-Luongo production - *The Birthday Club* - was directed by Julyen Norman and played successfully and uproariously this March.

UUPPC is planning a series of One-Act Plays this fall during the weekend of November 20-23 and will feature, in addition to returning UU Players, many newcomers who will be bringing their unique talents to the stage. You won't want to miss it!

UU Players is an open-door company; anyone interested in participating, as an actor, director, backstage crew, graphic designer, etc., is welcome. Simply chat with one of our current players to learn more.

Submitted by Tom Croarkin, Jim Luongo and Julyen Norman.

Year-Round Stewardship Committee (YRSC)

Mission Statement. To create a sense of ownership, drive mutual responsibility, foster a culture of caring and generosity, and facilitate communication within the Unitarian Universalist Congregation in Westport (UUWestport) community.

Overview. For the first time in quite a few years, we not only achieved our pledge drive goal BUT we exceeded it – and continue to do so. Several events and strategies came together to help us achieve this milestone, and the infusion of energy and help from additional committee members this year was a blessing. The congregation exhibited a renewed energy, and it showed in gatherings, financial commitments, and volunteering.

The upward trend continues with new congregants at our Sunday services, and overall activity within our social justice groups, Faith Formation classes, and music at UUWestport. Revenue came in from congregants fulfilling their 2025-2026 pledges in addition to non-restricted contributions and fundraisers, facility rentals, and restricted contributions.

The YRSC focused on outreach and engagement with existing and new congregational members. We exceeded our participation from last year. While the campaign was largely based on introducing our new settled minister, we were able to pivot when circumstances resulted in a change to this plan.

Our Annual Pledge Drive Theme – “Get Set...GO!” The theme of our annual pledge drive was, “Get Set... GO!” We implored the congregation to consider the importance of supporting our new settled minister and taking ownership in our vision at UUWestport – the people, programs, and principles that make our congregation a force for good in the world – and how their financial commitment is essential. While plans changed from calling a settled minister, the need to sustain and build our vision was strong.

Key activities that were part of this year's pledge drive include:

SOUNDINGS Updates. We printed weekly updates on the current state of the campaign and provided uplifting communications to help congregants consider why it is important to pledge.

Sunday Services. Rev. Carlton led the way on every Sunday with inspirational services. In addition to hearing wonderful testimonials, congregants could visually see where we stood with our campaign with our colored-in thermometer poster in the foyer.

Email Communications. At key points during the campaign, Rev. Carlton sent out key updates on the campaign to our congregation.

Cottage Parties. Several members graciously hosted cottage parties at their homes, where attendees enjoyed a wonderful meal in the company of other members and friends, reflected on the blessings received, and discussed the importance of supporting our vision at UUWestport.

Visiting Stewards. Several of our most dedicated congregants volunteered to make phone calls and meet with pledgers to help underscore the need to take ownership of our vision at UUWestport. We want to thank that group for all their efforts.

Thank-You Notes. We sent out (and will continue to do so) thank-you cards that were decorated by many congregants to our givers and pledgers.

Pledge Drive Celebration and Talent Show. To celebrate the success of our pledge drive, we hosted an afternoon of music, food and fun for the congregation.

During the pledge drive, we celebrated the extraordinary Nancy Treadwell Bequest of more than \$802,000. We believe that this generous support of our vision helped further inspire the financial commitments from our congregation.

Pledge Drive Results for the 2026-2027 Year. As of May 25, our total pledges for the 2026-2027 congregational year come to \$591,478. We had originally committed to \$580,000 in the budget, which we have exceeded. This is an INCREASE of more than \$40,000 from last year's total.

The number of pledges from families and individuals – at 184 as of May 25 – is also up by 13 from last year's number. As always, we expect more pledges to trickle in throughout the current calendar year, even though the campaign has officially ended.

Breakdown of pledges for 2026-2027:

	Pledges	Total Pledge Amount
Increased from Last Year	92	\$368K
New for Upcoming Year	22	\$30K
Same as Last Year	45	\$145K
Reduced from Last Year	25	\$48K
TOTAL	184	\$591K

In addition, a generous donor within the congregation committed to matching increases in pledges from last year and new pledges, dollar for dollar, provided that the pledges are fulfilled in the coming year. The matching

amount came to \$90,162 and led to a 20% average increase among those congregants with higher pledges than the previous year.

As a result, the Finance Committee has recommended a cost-of-living adjustment (COLA) for staff salaries and no staff cuts for the upcoming year.

Update on Fulfilled Pledges for the 2025-2026 Year. Pledging remains one of our most important business processes: it allows us to budget for next year with a reasonable assumption of what income will be available to us. Our final pledge number for the 2025-2026 year was \$551,000 from 171 pledges. As of May 25, we await the final \$37,000 (7%) of payments on pledges, having collected almost \$514,000 so far.

Additional Activities. The YRSC also led additional activities for the current congregational year:

2025 Holiday Appeal. We raised \$29,629 with this campaign. This is an INCREASE of more than \$8,000 from last year. The YRSC sent out thank-you notes to all givers, sent out a thank-you email blast, and used SOUNDINGS to communicate the campaign.

Fundraising Workshops. With the help of Anthony Cembra and Chris Altrock, consultants from Brian Lacy & Associates, we ran two workshops with our Visiting Stewards and other congregants to strengthen best practices in fundraising around messaging and communications. In addition, regular “office hours” were held to support canvassing efforts.

Culture Survey and Engagement Study. With the help of our outside consultants, we conducted a structured congregational culture and engagement assessment. We identified key themes and recommendations to strengthen belonging, participation, and philanthropic engagement.

Planned Giving Workshop. In June, with the help of our outside consultants, we will conduct a workshop focused on planned giving and legacy conversations.

Wrap-Up and Next Steps. Our pledge drive was a success. Our outside consulting team brought seasoned expertise in stewardship strategy, volunteer activation, and donor-centered engagement. With their help, the YRSC established a basis for messaging and communication beyond just meeting needs that will serve as the backbone for our remaining efforts this year and beyond. We need to continue the focus on systemic positive engagement with our congregation that will drive participation, invite and sustain new congregants, and establish ownership within all of us towards building our vision for UUWestport.

We are grateful for the congregation’s financial support and all that the congregation does to make UUWestport a place of inspiration, love, and action. This is a fundamental process of our community, and we thank everyone for their efforts and generous contributions as they can. Our pledging population continues to rise, while core members continue to step up to support our community.

Respectfully Submitted, Year-Round Stewardship Committee: Sam Somashekar, Rev. Carlton E. Smith, Sari Bodi, Felicia Keeton, Brian Lasher, Elena Rockman-Blake

MEMBER LIST AS OF MAY 15, 2026

Lia Albo	Randy Burnham	Steve Del Rosso
Michelle Albright	Jennifer Butler	Douglas Dempsey
Melanie Allen	Ellen Cahill	Danielle DiGrazia
Ali Alzabidi	David Callan	Cheryl Dixon
Karen Anderson	Chris Campbell	Beth Dobsevage
Nancy Andry	Lynda Campbell	Lisa Donohue
Christine Aquino	Diane Cano	Peter Donovan
Harbans Arya	Dave Caplan	Sofia Dumery
Laura Axthelm	Laurel Carey	Joan Duncan
Stephen Axthelm	Denise Carreau	Pamela Einarsen
Beverly Bailey	Leslie Cenci	Teryl Eisenberg
Richard Bailey	Ben Chan	Erin Eisner
Melissa Balmer	Cindy Clair	Jonathan Elkind
Reed Balmer	Beth Cliff	Marsha Elkind
Donald Bancroft	Candace Clinger	Stapley Emberling
Martha Bancroft	Lynn Colafrancesco	Amy Feinman
David Bauer	Neil Coleman	Jeff Feinman
Jackie Beck	Chuck Colletti	Kate Feuer
Diane Becker	Rosemarie Colletti	Sean Feuer
Diana Bell	Thomas Comer	Margaret Fitzpatrick
Sarah Bell	Brian Connelly	Adam Fleisher
Pippa Bell Ader	Martha Constable	Michelle Fleisher
Eileen Belmont	Jim Cooper	Anne Flounders
Casey Berg	Mark Corcoran	Michael Foley
Christine Bergstrom	James Corradino	Ruth Fontilla
Jason Black	Michael Costantino	Jamie Forbes
Paul Bluestein	Joann Coviello	Jim Francek
Alex Boboc	Noreen Coyne	Pat Francek
Sari Bodi	Lynn Crager	Luisa Francoeur
Jennifer Boland	Timothy Crager	Kim Fuchs
Carol Boston	Kate Croarkin	Jon Gage
David Boyd	Tom Croarkin	Leigh Gage
Deborah Barnett Brandt	Mary-Jane Cross	Anita Galvan-Henkin
Robert Brandt	Aly Crouse	Monica Garrison
Jan Braunle	Ildiko Csik	Deb Garskof
Charlie Brennan	Bob Cygan	Josh Garskof
Shari Brennan	Susan Dam	Luke Garvey
Alan Brewster	Chelsea Danburg	Michelle Garvey
Linda Brewster	Linda Daniels	Jennifer Gerometta
Rainy Broomfield	Douglass Davidoff	Joanne Glasser Orenstein
Dayle Brownstein	Marjolijn de Jager	Carol Goddard
David Bue	Kathy-Jo de Vos	Peggy Gormley
Marie-Claire Bue	Joy Del Rosso	Andrew Graham

Steve Grathwohl
Eric Gribin
Catherine Guilliani-Groell
Andy Gundell
Carolyn Gundell
Angi Haen
Judith Hamer
Lyn Hamilton
Debbie Handler
Len Handler
Kristi Hardin
Charles Harrington
Bill Hart
Nanette Hausman
Marie Hayes
Elizabeth Haynes
Alec Head
Tom Hearne
Adair Heitmann
Audrey Heneage
Lindy Hennessy
David Henry
Bobbie Herman
Robert Herman
Amanda Hilton
John Hooper
Jason Howard
Linda Hudson
Shahan Islam
David Jacob
Melissa Jacob
Jalna Jaeger
Holly Jaffe Johnson
Melissa Jagoe-Seidl
Sophia Jagoe-Seidl
Ann Johnson-Lundberg
Keith Johnston
Doug Jones
Meg Jones
Nicholas Jones
Brynna Kaulback
Maryellen Keenan
David Keeton
Felicia Keeton
Linda Keller

Sarah Keller
Vaughn Keller
Barbara Kezur
Sunny Khadjavi
Bob Kleid
Charles Klein
Jenny Klein
April Kleinman
Lyn Kobsa
Anatole Konstantin
Rosaria Konstantin
Sandy Kozma
Steven Kunstler
Kathy Kurzatkowski
Dale Kutnick
Laura Kutnick
Joe Lack
Nancy Lack
Becky Lai
Nick Lai
Lincoln LaMastro
Peter LaMastro
Joanna Largier
Tim Largier
Brian Lasher
Miki Lasher
Rob Laug
Terri Laug
Lynne Laukhuf
Kevin Leddy
Kristen Leddy
Ryan Leddy
Matt Leonard
Peter Lerman
Miriam Levin
Virginia Levin
Wendy Levy
Kathy Lewis-Bain
Patrick Leydon
Sara Leydon
Dara Lieberman
Jonah Loeb
Jay Lubin
Linda Lubin
Janet Luongo

Jim Luongo
Barry Lytton
Claire Lytton
Elizabeth Macdonald
Debra Mahony
Edward Mahony
Darryl Manning
Gerry Manning
Alexa Marshall
Fred Marshall
John Mason
Danielle Masse
Maureen McBride
Cathy McElroy
Fiona McElroy
Carrie McEvoy
Lawrenzo McGee
Nancy McKeever
Jenna McPartland
Matthew McPartland
John McWeeney
Felicity Medinger-McWeeney
Diane Melish
Elizabeth Miller
Loren Mitchel
Diane Moller
Sven Moller
Mary Beth Mollica
Sal Mollica
Mary Money
Fredda Monn
Eric Montgomery
Luke Montgomery
Kristin Morrell
Gian Andrea Morresi
AJ Morris
Nina Nagy
Shanonda Nelson
Glenn Newell
Noelle Newell
Amy Nonnenmacher
Andreas Nonnenmacher
Katherine Noordsij
Julyen Norman

Deborah O'Brien
Jeremiah O'Brien
Jean O'Dell
Patrick Olivieri
Eileen O'Reilly
Kristine Oulman
Neil Pabian
Cathy Paine
Ari Palczewski
Gwen Parker
Kiera Parrott
Marjorie Partch
Erik Paul
Larry Perlstein
Bob Perry
Gail Pesyna
Anita Pfluger
Marie Pham
Chris Place
Harvey Place
Sharon Poole
Carol Porter
Cindy Potter
Carole Prescott
Susan Pugliese
Elizabeth Quesada
Alan Rackson
Alice Rago
David Raymond
Marilynn Reed
Dorothy Rich
Kathy Roberts
Connie Rockman
Elena Rockman-Blake
Kim Rogers
Rob Rogers
Mary Jo Romano
Florence Romanov
Liane Roseman
Steven Rosenberg
Bonnie Rother
Kassandra Saloommey
Ravi Sankar
Shrutika Sankar
Sudha Sankar

Lynelle Schneeberg
Penny Schneider
Liz Seaman
Scott Seo
Aaron Seymour
Jane Sherman
Susan Sherman
Victoria Sherrow
Emily Sherwood
Sheila Sherwood
John Simboli
Scott Singer
Alison Smith
David Smith
Maria Mendoza Smith
Robert Smith
Tanya Smith
Paula Soares-Somashekar
Rachel Sobolewski
Sam Somashekar
Judy Soronen
Susan Starkie
Laura Steinbrecher
Donna Stone
Bart Stuck
John Suggs
Ted Sullivan
Ann Sikes Taylor
Faith Taylor
Ingrid Taylor
Ron Taylor
Arnela Ten Meer
Joyce Thomas
Phil Thomas
David Thompson
Barbara Thormahlen
Karen Thorsen
Kate Throckmorton
Elizabeth Towne
Bob Trefry
Mary Trefry
Gina Troisi
Joanne Turmelle
John Turmelle
Emily Tuttle

Art Ulrich
Christine Updegraff
Andres Valenzuela
Lina Valenzuela
Pat van de Kamp
Andra Vebell
Ken Vernon
Natalie Vernon
Naree Viner
Gaby Vishnevskaya
David Vita
Jerusha Vogel
Ken Vogel
Regina Walsh
Marliss Walther
Sheila Ward
Marguerite Webb
Deborah Weingrad
Bob Welsh
Holly Wiemken
Jim Wiemken
Brenda Williams
Tim Wilson
Trina Wong
Karen Wright
Julia Wyant
Melanie Wyler
Christine Yang
Ted Yang
Ping Zhou
Robert Zuckerman

MEMBERSHIP SUMMARY OVER THE YEARS

Year	2016-17	2017-18	2018-19	2019-20	2020-2021
Beginning of year	421	383	419	421	415
Additions	13	49	17	27	17
Losses	49*	13	15	33	32
Moved Away	9	6	3	11	2
Deceased	7	6	10	7	7
Resigned	1	1	2	0	0
Other	32			15	23
End of Year	383	419	421	415	400

Year	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Beginning of year	400	386	372	362	373
Additions	12	15	9	22	16
Losses:	26	29	19	11	5
Moved Away	0	7	4		
Deceased	5	4	2	6	
Resigned	1	18	3		
Other	20	0	10		
End of Year	386	372	362	373	384

DRAFT Minutes of October 5, 2025, Special Member Meeting

The Unitarian Universalist Congregation in Westport (TUUCW) Final Minutes of the Special Member Meeting

Date: October 5, 2025

Time: 11:35 AM – 11:41 AM

Location: TUUCW Sanctuary and via Zoom

1. Call to Order

Beth Cliff, President of the Board of Trustees and Moderator for the meeting, called the meeting to order at **11:35 AM**.

2. Opening Reflection

Rev. Carlton Smith, Senior Minister, offered opening words to begin the meeting.

3. Quorum Confirmation

Felicia Keeton, Secretary of the Board of Trustees, confirmed that a quorum was present. A total of **82 members** attended, including **2 voting members via Zoom**, meeting the requirements to proceed.

4. Motion 1: Amendment to Constitution – Hybrid Voting

Motion Presented By: Sharon Poole

Seconded By: Mark Corcoran

Proposed Amendment #1 – Article VII, Section 4

To allow hybrid voting at member meetings by adding the following language:

"Members of the congregation may participate and vote in meetings remotely via audio and/or video conference. If the technology is unavailable or fails to work for any reason before or during the meeting, then the remote members shall be considered to have left the meeting – the remaining votes will not be counted, and they will no longer be counted towards the quorum."

Discussion: None

Vote Result: Passed unanimously

5. Motion 2: Amendment to Constitution – COM Term Length

Motion Presented By: Cathy Paine

Seconded By: Steve Grothwahl

Proposed Amendment #2 – Article X, Section 4

To reduce the term of Committee on Ministries (COM) members from five years to three, modifying the section to read:

"The COM is comprised of seven members elected to serve for staggered three-year terms."

Discussion:

- Eileen Belmont suggested replacing "COM" with "Committee on Ministries."
 - Ken Vogel, Parliamentarian, advised that the language of the Constitution could not be changed at this time and recommended proceeding with the vote as proposed.
- Dayle Brownstein inquired about the effective date of the change.
 - Melanie Allen, COM Co-Chair, clarified that the change would take effect immediately. For example, a current COM member who began their term in 2022 would now conclude their service in **June 2026** instead of **June 2028**.

Vote Result: Passed by majority

6. Adjournment

Motion to Adjourn: Passed unanimously

Meeting Adjourned At: 11:41 AM

Respectfully Submitted,

Felicia Keeton

Secretary, Board of Trustees

Date: October 13, 2025

DRAFT Minutes of June 8, 2025, Annual Member Meeting

MINUTES OF THE 74th ANNUAL MEETING OF THE UNITARIAN UNIVERSALIST CONGREGATION IN WESTPORT

SUNDAY, JUNE 8, 2025

Summary of Key Decisions:

- Approved the use of up to \$100,000 in unrestricted endowment funds to cover operating expenses, if needed, in 2025-2026.
- Approved the use of up to \$30,000 in unrestricted endowment funds to cover a new 1099 development consultant responsible for identifying and pursuing revenue generation opportunities in 2025-2026.
- Approved the 2025-2026 budget.
- Approved the 2025-2026 Board, COM, Endowment and Nominating elected committees.

Proposed constitutional amendments (first reading with final action by 10/5/25)

- Approved amendment to allow hybrid voting at member meetings with a provision that in the event the web meeting technology fails, the record will show that the virtual attendees left the meeting and will not be counted towards the quorum for any votes.
- Approved amendment to change the Committee on Ministries (COM) term from 5 to 3 years.

Meeting Minutes

Call to Order: Beth Cliff, Board of Trustees President, called the 74th Annual Meeting to order at 11:50 a.m. She acknowledged Ken Vogel as the meeting Parliamentarian, reviewed meeting protocols and provided remote attendee instructions.

Opening Reflection: Reverend Alan Taylor shared opening words while the chalice was lit.

Quorum Report: Felicia Keeton, Board Secretary, announced the quorum has been met with 83 voting members present at the meeting and 2 members participating via Zoom.

Motion: To allow the use of hybrid voting at this meeting was made, seconded and unanimously approved.

Motion: To approve the draft minutes of 4 Member Meetings listed below (annual report pages 55-62). The motion was made by Ken Vogel, seconded and unanimously approved.

- June 9, 2024: Annual Member Meeting

- September 15, 2025: Special Member Meeting on Construction
- January 12, 2025: Special Member Meeting on Ed Thompson Emeritus
- April 27, 2025: Special Member Meeting on Settled Search Committee members

The Very Fine Lifetime Volunteer Service Award

- Ravi Sankar, Board Vice President, presented this award to Randy Burnham for his contributions to the congregation and time invested in key positions and programs including, but not limited to, the Board of Trustees, Religious Education, Social Justice and his work with the UUA.

Board of Trustees Report

- Beth Cliff provided a summary of her report shown on pages 12-14 in the annual report.

Report on Construction

- Ken Vogel provided a summary of the Capital Construction Engagement Team's report shown on pages 19-20 in the annual report.

Report on Transitional Ministry

- Reverend Alan Taylor provided a summary of his report on pages 4-9 in the annual report.

Report on Right Relations

- Linda Lubin, Chair, shared some history about the formation of the Right Relations committee and discussed their goal of creating a living covenant that will help the congregation develop skills for a healthy and thriving environment intertwined with pastoral care and social justice.

Report from the Committee on Ministries

- Monica Garrison and Chuck Coletti, co-chairs, summarized their purpose and activities as outlined on page 15 of the annual report.

Report on the #MeToo Resolution

- Reverend Alan Taylor explained that our bylaws require a report but this past year there wasn't a specific committee working on the #MeToo Resolution. The congregation does have, however, active gender equity and reproductive justice committees.

Report on the Anti-Racism Resolution

- Reverend Alan Taylor stated our bylaws require a report on this and clarified this resolution is now carried out by the Racial Justice Matters committee (see page 40 of the annual report).

Report on General Assembly Delegation for June 2025

- Reverend Alan stated that Brian Lasher, Chris Aquino, Kathy Roberts and Cheryl Dixon will attend in person plus Ken Vernon will attend online.

Motions on proposed Constitution amendments

- Beth Cliff set the stage for the following two motions, stating they must pass with a two thirds majority today, and then the Congregation must meet again and have an up or down vote within 120 days.
- **MOTION #1: To amend the Constitution to allow hybrid voting at member meetings**
 - Stapley Emberling read this motion, seconded by Jerusha Vogel:
 - *This is a motion to allow hybrid voting by amending our constitution, adding the following language to the end of Article VII section 4 (after "Absentee voting shall be for elections only"):*
 - *Members of the congregation may participate and vote in meetings remotely via audio and/or video conference. If the technology is unavailable or fails to work for any reason before or during the meeting, then the remote members shall be considered to have left the meeting – the remaining votes will not be counted, and they will no longer be counted towards the quorum.*
 - Discussion:
 - Bob Perry asked about the timing of a member registering to participate online to attend a meeting virtually. Stapley Emberling answered that typically the Secretary announces the meeting no later than the prior Wednesday, and members have until Noon the day before the meeting to sign up for online participation. It was discussed whether it would be important to clarify this in the constitution. Ken Vogel, Parliamentarian, stated that normally the Board is responsible and makes decisions on practical things like this and recommended not requiring specific dates or requirements be added to the Constitution about pre-meeting registration.
 - Dayle Brownstein raised concern about members attending in good faith and then not being able to participate due to a technical issue. After some discussion, an amendment to the original motion was proposed by Sharon Poole and seconded by Linda Hudson to add language that states specifically what will happen if there is a technology failure to make sure

everyone's vote counts. There was discussion on how to make the motion specific, yet to give the Board flexibility in handling any given circumstance. Stapley Emberling reminded everyone that there are usually only a few online participants and the impacts of rescheduling a meeting if there's an Internet failure - just to capture typically a few votes. Ken Vogel, supported by some members, recommended not changing the original motion and leaving it to the board's discretion how to handle technology issues during a meeting, given the Board will always look for new and better ways to ensure everyone's vote is counted. Sharon ultimately withdrew her proposed amendment. Beth called for a vote on the original motion from Stapley, and it passed unanimously.

- **MOTION #2: To amend the Constitution to reduce the term of COM members from 5 years to 3:**
 - Monica Garrison and Chuck Colletti, COM co-chairs, shared that this year the COM needed to recruit 4 new members and how a 5-year commitment made this very difficult. Chuck read the motion, seconded by Randy Burnham:
 - *A motion to reduce the COM term from five to three years, by amending the constitution and replacing the first sentence of Article X section 4 to read "The COM is comprised of seven members elected to serve for staggered three-year terms."*
 - Discussion – a few members stated this is a good idea.
 - The motion was called and passed by two-thirds majority (3 voted against).

Financial Reports:

- **2024-2025 Stewardship Report**
 - Elena Rockman Blake, co-chair, shared that pledges are slightly lower than what was budgeted, however, they are still coming in. The concern is more about the number of pledge units versus the dollars pledged because there are a few families that have stepped up their contributions. Elena thanked her co-chair Sam Somashekar and will step down from this position to work on the committee to find a settled minister.
- **Financial Results & Proposed Budget**
 - Mark Cocoran filled in for Jon Gage, Treasurer, and summarized the report on pages 20-29 of the annual report. Overall, the congregation is in a good financial position (i.e., no debt, a healthy endowment), but there are challenges in covering annual operating expenses. The best practice is for member pledges to cover 100% of staffing costs, which make up over 60% of our operating costs. Our pledges have fallen short in recent years. The result is we're consuming our endowment principal, instead of only relying on its investment income, which is not financially sustainable for the long term. In the coming fiscal year 2025-2026, it's projected that the operating budget deficit will continue. The shortage is expected this year to be \$99,000. Because of this, at the request of the

Endowment Committee, a financial sustainability plan is proposed to equalize operating revenue and expenses.

- **Financial Sustainability Plan**

- Brian Lasher summarized the proposal on pages 30-31 of the annual report, and stated this information is the same as that was shared during the previous Sunday Bagels with the Board. He stressed that we cannot rely on past financial assumptions going forward and need a proactive and structured response to make sure our operational costs are covered without consuming our Endowment principal year after year. He highlighted two plan commitments outlined below, plus discussed opportunities to increase revenue and strengthen operations:
 - In 2029 pledges will cover staff costs.
 - Hiring a part time development consultant that is responsible for increasing pledges, membership, exploring grant opportunities and supporting stewardship.

- **Endowment Committee Report**

- Ken Vogel summarized the current state of our endowment as described on pages 15-16 of the annual report. He shared we have a balance of about \$4M comprised of different funds that can be used for different purposes (based on the donor's wishes whereby the Board has the option to add additional restrictions beyond this). Our general unrestricted fund has a balance of about \$1M. This can be used to cover operating costs.

- Ken presented these two motions related to the Financial Sustainability plan:

- **MOTION #1: To approve spending up to \$100K of unrestricted funds from the Endowment, if needed to fill gap in budget shortfall**
 - Ravi Sankar seconded the motion
 - Discussion:
 - Questions asked by members and answered by Ken Vogel:
 - Is the approval to spend \$100k of unrestricted funds limited to 2025-2026? Yes.
 - Can investment income generated from funds other than the unrestricted be added to the unrestricted fund? No.
 - Other discussion: Neil Coleman, a previous endowment committee lead, stated he is bothered by the concept of spending other people's money on operating expenses. Elena Rockman Blake empathized with Neil's point of view but shared that the UUA has had to help congregations close their doors because of declining membership, whereas the UUA has never had to shut a congregation down because of not having an endowment. She also warned if we continue to cut our staff, we'll keep cutting into our muscle, instead of fat, which will reduce our attractiveness to new members. She believes with the financial sustainability [plan](#), we can turn the ship around. Rob Zuckerman agreed and reminded everyone of the 17 new members we've signed up this year. Holly Jaffe asked and received

clarification from Beth Cliff about the Operations Council versus the development consultant role.

- Beth Cliff called for a vote on the motion and it was approved unanimously.
- **MOTION #2: To approve spending \$30,000 to hire a new development consultant**
 - Jerusha Vogel seconded the motion
 - Discussion:
 - Ken provided these clarifications and answers on how this new position will work with the new Operations Council designed to support the minister:
 - There are volunteers who've agreed to fill the Operations Council positions. More details will be shared on this in the coming months.
 - The board voted on forming a volunteer Operations Council versus creating a paid operations director role after the Governance Council was formed.
 - The development consultant role requirements are generally outlined and will be delegated to the contract minister and Operations Council to specify with Board involvement (e.g., pledge drives, grants to pursue).
 - The development consultant role could be filled with help from the UUA.
 - The development consultant role is a doer, not a consultant.
 - The role's scope will include marketing and promotions.
 - There is always a risk of not getting a return on our investment, but there are ways to mitigate this risk.
 - This is not a vote to spend the money -it's a vote to make the money available from our endowment.
 - The \$30k for this role is not a subset of the \$100k just approved. If both motions are approved, the total is \$130k.
 - Other member comments:
 - Naree Viner stated she does this type of work for a living and thinks \$30k is a bargain to have one person focused on growing revenue.
 - Dave Kaplan thinks this new position will help our broader community, many who have similar values, learn about us.
 - There was some discussion about other potential revenue streams like solar.
 - Beth Cliff called for the vote which was passed by the majority (only 1 opposed).

MOTION: Ratification of 2025-2026 Budget

- Mark Corcoran made a motion to ratify the 2025-2026 budget which was seconded by Randy Burnham. The motion was approved unanimously.

Elections for the Elected Committees

- Jerusha Vogel, co-chair, presented the slate for elected positions as show on page 3 of the annual report
- Eileen Belmont made the motion and Stapley Emberling seconded to affirm the new committee slates for the Board, COM, Endowment and Nominating committees.
- Discussion: It was clarified that changing the COM term to 3 years is not yet in effect because this constitutional amendment change requires a second member vote by October 5th.
- The motion was approved unanimously.

Installation of New Board & Elected Committee Members

- The new elected committee members were installed together.

Recognition of Congregational Service

- Beth Cliff recognized Sharon Poole's contributions to our congregation. Sharon served on Reverend Alan's transition team, the Governance committee as well as orchestrating Ed Thomson's retirement and participating in and advocating for our music program.
- Beth also recognized Ruth, Sue, Angi and Micah's contributions and thanked our outgoing board members Anita Pfluger, Brian Lasher and Stapley Emberling.
- Randy Burnham and Stapley Emberling acknowledged Reverend Alan's contributions and presented him with a gift.

New Business

- Beth reminded members to complete the Share-the-Plate & floor color ballots.

A motion to adjourn the meeting was made by Beth and seconded by Randy Burnham.

Meeting adjourned at 2 p.m. ET