

UNITARIAN
UNIVERSALIST
SOCIETY OF
GREATER SPRINGFIELD

Annual Meeting of the Congregation:
November 15th, 2026 @ 12:30PM

Meeting Materials:

- **Meeting Link**
- **2026-27 Board of Trustees**
- **2027 Annual Operating Budget w/ notes**

The 2026 Annual Meeting of the Unitarian Universalist Society of Greater Springfield will occur both in person and online!

Folks who gather at UUSGS will be invited to stay for a celebratory community meal to follow the meeting.

You can also access the meeting online by computer and/or connected device (e.g., phones, tablets). The link is below. See you there!

https://us02web.zoom.us/j/86035648311?pwd=nYYFHuGrMqxMSTzwwBcEbCrGUKo9Op.1

STEWARDSHIP MATTERS!

> *When tyrants tremble as they hear the bells of freedom ringing…*
> *when friends rejoice both far and near, how can I keep from singing!*

This verse was written during the McCarthy era to protest that generational expression of paranoia and fear. A good reminder that we've been tested before!

Given how the world is today, two truths of congregational stewardship are clear:

1.) It is more important than ever to be investing in deep values and caring community.
2.) The struggle is real. Costs rise and barriers mount… even as needs rise, too…

Some people are motivated to give by stress and urgent need; others are motivated more by hope and possibility. The modern situation brings a bit of both… so take your pick!

The bulk of our annual stewardship occurs online (though we also accept checks, cash, stock… gold bars…). To find our donation page online, go to our main web page (www.UUSpringfield.org) and look for the word "Donate" in the upper right. Please be generous at a level that works for you & yours. Of course, if you need assistance at any time — with online giving, giving in other ways… or pretty much anything else! - please be in touch with Denise Benoit (denise@UUSpringfield.org).

If you already make a sustaining gift… THANK YOU!! We do invite you to review your giving regularly. If you do not yet make a sustaining gift, please consider doing so now. Every donation and every pledge truly does make a difference, especially now.

Thank you for all you do to bring more love into the world… and for making UUSGS a beacon of transformative love in our wider community! Love will prevail!!!!









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UUSGS Board of Trustees 2027-2028 Officers and Members-at-Large:

Officers



Teddy Welsh (President) lives in Westfield, MA with his husband, Jon Todd (also a member here), and their kids Valerie and Kadin. During the day, Teddy teaches at Westfield State University, and by night he sings (mostly in the choir here). He is a lifelong Unitarian Universalist, and has previously served as congregational treasurer, on the finance committee, facilitating Our Whole Lives and leadership development, worship associate, and leading a Bread for the Spirit group. He is excited to continue contributing to the visionary leadership here at UUSGS!



A member of UUSGS since 1995, **Verne McArthur** (Vice President) likes to say that he's "retired from adult education, un-retired from activism, and a workshop leader, singer, and song-leader." Verne has been facilitating "Active Hope" environmental workshops for over 10 years, and is involved in environmental activism through the Springfield Climate Justice Coalition. Verne also offers lay-led UU services a few times a year at congregations in New England. "In all this work, I feel my calling to be to help us all find our way through the enormous challenges facing us in creative and life-enhancing ways. My motto comes from Wendell Berry: 'Be joyful, even thought you've considered all the facts!'"



Jackie Shanti (Clerk) is a lifelong UU, growing up in a UU Fellowship in West Lafayette, IN, and moving from Davis, CA in 1976 to Springfield, where she has been an active member ever since. She retired in 2018 after nearly a half-century as an RN, specializing in Staff Development and Electronic Clinical Documentation. Jackie served UUSGS as the Coordinator of Congregational Life (part-time staff position) from 2013-2019. Her volunteer activities have included coordinating lay led summer services, being a Worship Associate and Beacon, organizing Soulful Suppers, co-leading the Racial and Economic Justice Ministry Team, and chairing the Ministerial Search Committee in 2012. Jackie's devotion to our faith has also included being active with District, Regional and UUA governance. She sat on the UUA Board (2003-2013); UUA Ministerial Fellowship Committee; and New England Region (NER) as a Leadership Development Facilitator. She considers it an honor and a joy to work now with the UUSGS Board. Jackie and her husband, Carl, who is also an active member, met and married at UUSGS in 1987 and love to travel!

Trustees At-Large



Martin Garnar and his husband Mark Paquette joined UUSGS in 2024 and live in South Hadley, MA with their miniature dachshunds. Martin is the director of the library at Amherst College, where he has gained quite a bit of experience tending to an aging mid-century building. When he's not changing light bulbs in the sanctuary using skills he perfected as a junior member of the property committee at his childhood church, you're likely to see him singing in the choir or serving as a worship associate. Martin first joined a Unitarian Universalist congregation in 1996 and is glad for the opportunity to serve the UUSGS community.

Trustees At-Large (cont'd)



From **Naomi Olivero**: "I am a queer Latina woman, born in San Juan, Puerto Rico, raised in the Deep South, and proud of her Black and Taino roots. "My journey has shaped the way I see the world, the way I love people, and the importance I place on kindness, acceptance, and community. I began attending UUSGS in 2024, never really expecting to find what I didn't even realize I was looking for: Family, Belonging, and a community where I could show up as my whole self. What started as simply attending a congregation became something much more meaningful, and I am incredibly grateful for the people and connections that have made this place feel like home."

"I consider myself a kind-hearted person who believes that sometimes the most meaningful things we can offer one another are the simplest: a listening ear, a helping hand, a little encouragement, or simply making someone feel that they belong. I am genuinely excited and honored to serve on the Board of Trustees, and look forward to listening, learning, contributing, and helping nurture the community that has given so much to me."

"Whether you need someone to talk to, an extra set of hands, a little laughter, or a good dessert, I am always happy to help. I believe community is built through the little things we do for one another, and I hope to bring plenty of kindness, enthusiasm, and willingness to show up wherever I am needed."



Jen Vose lives in Springfield with her husband, Dave, and their 2 children, Gilbert and Daisy. Alongside the joys (and struggles!) of parenting, Jen is an adjunct faculty member for Bridgewater State University, where she teaches online courses in the Health and Kinesiology department. Jen is a dedicated member of the UUSGS Chorale, and also lends her time and energies to working with the congregation's children through family ministry. Jen has been a member of UUSGS since 2012, and this is her first time serving on the congregation's Board of Trustees. She enters this ministry with curiosity, an open mind and heart, eagerness to learn, and an abundance of hope for the congregation's present and future.

Trustees At-Large (cont'd)



Jim Woodell has participated in Unitarian Universalist communities throughout his adult life, including past service on the board of the UU Church of Medford (MA). He and his husband, Arthur Smith, began attending UUSGS in summer 2024 and officially joined in December 2025. At UUSGS, Jim participates in a Covenant Group and serves on the tech team supporting Sunday service audio and video.

Professionally, Jim's career has focused on higher education. For the past fifteen years, he has partnered with institutions on regional economic, community, and workforce development to deepen the societal impact of higher education. He and Arthur live in Longmeadow with their two cats, Scout and Rosey. Outside of church, Jim is an avid knitter who loves teaching the craft to others, and together he and Arthur enjoy exploring arts and culture offerings locally and wherever they travel.

As a Trustee, Jim hopes to bring his passion for community-building and practical systems thinking to help UUSGS navigate both its opportunities and challenges with clarity and shared purpose.

Budgeted Revenue & Expense for 2027

		Narrative Note
REVENUE:		
Operating Pledge Income	$225,000	1
Fundraiser Revenue	$6,000	2
Program & Event Fees	$30,200	3
Building Rentals	$88,000	4
Donor Funds, Endowment Contributions	$45,900	5
Designated Income (Offering, Mem. Garden)	$29,200	6
	$424,300	
EXPENSES:		
Payroll, Taxes, and Benefits	$266,200	7
Contracted Services & Professional Fees	$18,400	8
Offering Disbursement, External Partners	$20,000	9
Insurance Expense	$20,600	10
Utilities	$31,900	11
Building & Facilities Expense	$14,200	12
Memberships (UUA , Interfaith)	$9,200	13
Programming & Ministries Expenses	$43,800	14
	$424,300	
NET SURPLUS (Deficit)	**$0**	

TOTAL INCOME = $424,300

1 - **Operating Pledge Income: $225,000**
Revised down from 2026 ($236,500), this pledge income goal feels more achievable, balancing the need/desire to grow with an honest assessment of the broader financial situation faced by many households.

2 - **Fundraiser Revenue: $6,000**
Similarly revised down. The auction was removed. While we believe more is possible here, we are not reliant.

3 - **Program & Event Fees: $30,200**
The main driver here is ticket income from artistic events. Unity House Players has already taken in over $20k in 2026, after bringing in ~$35k in 2025. These numbers are attached to expenses, with an expected margin each year of ~$5,000.

4 - **Building Rentals: $88,000**
Playful Minds pays base rent plus a utility offset for daytime use of the classroom wing. This line also includes $3,000 for other outside rentals.

5 - **Donor Funds, Endowment Contributions: $45,900**
The Legacy Fund (of UUSGS) contributes ~5% annually; in 2027, we estimate that to be approximately $19,500. UUSGS also receives annual contributions from the UUA Pool, the Yaeger Trust, and the Jordan Trust; expected contributions from trust funds total $26,400.

6 - **Designated Income (Offering, Mem. Garden): $29,200**
The bulk of this income is our weekly Offering collection, designated primarily for external partnerships. Memorial Garden payments total ~$1000.

TOTAL EXPENSES: $424,300

7 - **Payroll, Taxes, and Benefits: $266,200**
Staff compensation remains the largest portion of our budget. UUSGS is committed to attracting and retaining excellent professional staff.

8 - **Contracted Services & Professional Fees: $18,400**
Includes expenses for IT services, guest worship leaders & musicians, instrument maintenance, payroll services and bookkeeper.

9 - **Offering Disbursement, External Partners: $20,000**
Most months, the Offering collection goes out the door to support partners with whom we collaborate to build the Beloved Community. 2-3 recipients each year benefit “internal” social justice ministries, such as Loaves & Fishes.

10 - **Insurance Expense: $20,600**
This represents the premiums for Umbrella, Commercial Property, Business Auto, and Workers’ Compensation insurance.

11 - **Utilities: $31,900**
This includes payments to Eversource for gas and electricity, as well as Springfield water & sewer.

12 - **Building & Facilities Expense: $14,200**
This includes trash & recycling, maintenance supplies, snow removal, and other general building repairs. Capital fundraising is separate.

13 - **Memberships (UUA , Interfaith): $9,200**
This includes ~$9000 in annual dues to the UUA.

14 - **Programming & Ministries Expenses: $43,800**
This includes programming expenses and supplies related to: religious education, Soulful Supper, small groups & adult activities, worship, choir, Unity House productions, stewardship, and community care.

UUSGS Proposed 2027 Operating Budget Narrative

WHERE WE ARE TODAY — CURRENT YEAR (2026) BOTTOM LINE:

As of October 31, with 83% of the year complete, YTD income is at 72.68%. Individual contributions are at 70.41%. Both are lagging, for various reasons. Last year's budget built in a bump in individual (pledge) income; this hasn't materialized. (Current pledge income is nearly identical to what it was last year at this time.) We also haven't held an auction this year, typically the congregation's largest fundraiser. (Both of these adjustments are built into the 2027 budget.) Income is historically difficult to project year to year, especially against the backdrop of social and financial stressors. This year was no exception. That's the bad news.

The good news is that YTD expense at is 69.1%, less than income. This, despite signifiant increases in some expenses. We have already surpassed our utility expense (Eversource - gas & electric) projection for the year - already, with two months to go. Insurance expense is up 20% from the previous year. Soulful Supper has cost more, given the reduced functionality of our kitchen. And almost every other non-contractual, non-employee expense is up. What is true at home is true for the congregation: everything is more expensive. Still, we have managed to keep expenses within range of our income.

We do have a few large expenses to pay by the end of the year — such as 9K in UUA dues — but we also usually get a bit of a bump in end-of-year giving (hint, hint)… so we're expecting to be pretty well balanced at year end… albeit with some important considerations for next year.

PLANNING FOR THE YEAR AHEAD — 2027 BUDGET:

Despite feeling an obvious economic headwind, we remain optimistic in 2027… especially due to locking in some changes that have been occurring this year…

- A pretty major **staffing** realignment took place during 2026. Some of this was premeditated; some of it was in response to changing circumstance. We experimented with a few things, and we learned a few things. Based on extensive conversations with staff, lay leaders, and stakeholders, here is what we believe will position us well for growth in 2027 and beyond:
    - We're trying a new approach in religious education & family ministry. Rather than having one staff leader, responsible for everything from teachers to curriculum, communication to family engagement… we're dividing that work up between two leads (Angela & Erin) who are supported by a number of paid teachers (and volunteers). Spreading out funding — from one person to a team — while preserving accountability for core functions has allowed us to really benefit from some new deep and diverse leadership. Angela brings a wealth of experience in early childhood, while Erin is an experienced counselor and youth leader. Add to that the considerable talents of our teaching team and we're excited by what is opening up before us. Flexible funding between age groups allows the program to grow and adapt as needed. Team leads are paid more hourly, with a position that works out to be a shade above quarter-time. Teachers, supervised by the leads, are funded for at least 475 hours.
    - Darcie is now serving as Congregational Life Lead. This is a half-time position responsible for a number of membership-driven, membership-serving functions, including: hospitality, small groups, pathway to membership… as well as support of the Beacons, covenant groups, and more. Darcie asked for a chance to work more with adults, and so far she's been great!
    - The Music Director role is unchanged. (Go, Elisabeth!) Theater projects are funded separately, with professional leadership paid via the budget of each production.
    - Facilities and administrative support are each funded at 5 hours per week. An external bookkeeper (who meets weekly with Rev. Jason) is fully funded. Additional landscaping and classroom maintenance are coordinated with our preschool tenant.
    - Each of these staff functions can, and should, be supported by a group of **volunteers**. Building back our volunteer corps is a necessity this year, and a priority of leadership.

    - **Staff compensation** has been flat for years, despite their excellent work and an increasing cost of living. A priority of leadership — heard clearly at budget listings sessions in this and previous years — is fair compensation. In this budget, modest raises are proposed for the Minister (Jason; 1.8%), Music Director (Elisabeth; 4.7%), Congregational Life Lead (Darcie; 5.4%), and Producer (Eric; 8.3%). All other positions are paid a competitive hourly wage. The UUA creates guides for congregations (especially useful for Ministers). Adjusted for hours, all staff are paid at least 88% of fair compensation midpoints. (FYI - UUSGS is geo-index 4 and approximately ~200 members.)
- Last year, we suspended the annual sleepover retreat due to cost vs. reward. This year, we tried something new: FallFest @ UUSGS. The 2027 budget includes another similar undertaking, building on the fun of this year.
- The Board opted to not contract with a Board management tool… but rather to try generating its own reports of meeting, available on our website. This saved us ~$2500.
- Theater projects continue to be both a significant expense, but also a significant fundraiser - and an important component of our shared public ministry. **Unity House** brings in ~$5,000 pretty consistently (in addition to lots of people & energy!). This year, we expect that number to be even higher given the success of some late-year programming.
- We have revised **income** down this year from last year's projections… which, especially given the economy this past year, proved to be a bit optimistic. We are still hopeful for increased giving, but we don't want this to be a stressor as it was this past year. So… individual income is revised down $10,000. The auction has been removed. Fundraising income has also been revised down.
- Our relationship with our **primary tenant**, Playful Minds, remains strong. We completed a number of shared projects this year, including new floors for classrooms and office spaces, as well as new interior (with windows!) and exterior doors.
    - We are also seeing increased use of our building by outside groups, a priority this past year that is starting to see some real results… not only in incomes but in partnerships and visibility.
- **Endowment** contributions once again are consistent with the Harvard formula, meant to contribute to operations while not risking principal. Total funds held in long-term investments are approximately $530,000.

Notes/assumptions while reading budget:

Whenever possible, actual expenses are used in future projections. Last year's budget becomes the basis for the next. There are a few more changes than usual this time, given some staffing changes. Budgets are always a well-informed guess… because things can, and often do, change during the year. Such is the nature of ministry in community. Big-picture political and economic conditions change; programs and roles evolve; sometimes, unexpected needs arise. Good leadership is always learning and adjusting, which is why regular checkpoints are in place. Rev. Jason meets weekly with our bookkeeper. Reports are compiled monthly, then reviewed by staff before being presented to the Board of Trustees for ongoing review in their fiduciary role.

Please remember that Board members are volunteers who give generously of their time on behalf of the community. We welcome questions and dialog throughout the year, not only at budget time.

Capital income and expenditures are not included in this budget. The Strategic Planning/Capital Campaign team reports directly to the Board.