

**UUCA - Unitarian Universalist Church of Augusta**

3501 Walton Way Extension – Augusta, GA 30909

**FY 2026 Annual Meeting - AGENDA**  
**June 14, 2026 @ 12:30 PM via Hybrid Zoom/In-person Meeting**

**Call to Order**

Tim Hunter, Board Co-President

Welcome

Rev. Nic Filzen, Lead Minister & CEO

Confirmation of quorum

Sy Qadri, Board Secretary Nominee

\*Quorum 25% of Membership

Approval of Minutes

Sy Qadri

\*January 11, 2026 Midyear Congregational Meeting

**Business Items**

Pledge Drive Results

Brandy Hicar and Whitney Civitarese

End-Year State of the Financials

Lina Bracci, Board Treasurer

Operating Budget Approval

Lina Bracci

\*simple majority vote with count

Slate of Officers

Tim Hunter, Co-President

\* including review of Congregational Committee Members

\* simple majority, voice vote with clear majority, all at once

Mission Statement Rearticulation

LinhThi Do & Tim Hunter, Co-President

\* a two-thirds (2/3) majority vote of quorum to pass

**Reports - Summaries included in packet**

Minister

Rev. Nic Filzen

Co-President

Tim Hunter

Memorial Garden Committee

Larry Komp

Endowment Committee

Ted Newton

Proposed Endowment Resolution Changes

Ted Newton

\* a two-thirds (2/3) majority vote of quorum to pass

**In Memoriam**

Rev. Nic Filzen

**Special Reports/Service Recognition**

Committee Chair, Outgoing Members, and Board Recognition

LinhThi Do

President's Service Award

Tim Hunter

Unsung Hero Award

LinhThi Do

Introduction of GA Delegates

LinhThi Do

**Closing Words**

Rev. Nic Filzen

**Adjournment**

Tim Hunter

## **DRAFT**

### **Unitarian Universalist Church of Augusta**

#### **January 11, 2026 - Mid-Year meeting**

##### **Welcome and Call to Order – 12:47 pm**

Tim Hunter called the meeting to order.

Rev. Nic shared a breathing exercise to ground everyone.

##### **Confirmation of quorum**

Valerie Webster, secretary, confirmed that of 129 members a quorum of 54 members was present.

Minutes from the June 2025 meeting were reviewed. A motion to approve was made by Gayla Keesee. Stephen Heyl made a second. The motion passed unanimously.

##### **Financial Report**

Lina Bracci, treasurer, reported a loss of \$14, 950. Expected increase in pledge income will make up the difference.

##### **General Church updates.**

Rev. Nic shared updates to the church staff structure. Brandy Hicar. is now Director of Congregational Life. A generous gift from Alice Reese was used to hire a bookkeeper. Fern remains Membership Coordinator.

Grant update: Windows have been hardened. Front doors have been restored and strengthen. A new entrance has been installed. New doors are expected by the end of the month. Accessible emphasis in the courtyard area has been added and will be complete when adequate steps for the transition are installed. Bathrooms are not as high a priority because home school no longer rents from the Church.

A student minister is still in plans. Other groups partner with the church. An average of 80 participate each Sunday.

Seven new members have been added to the membership.

Celebrations of life – Andy Reese and Herb ?? will be observed in more detail at the annual meeting in June 2026.

Rev. Nic and staff will practice a soft spending freeze over the next month.

There was a comment from Chris Drescher to express appreciation to staff and board.

Question about where auction income shows up in the budget. – answer is “funding”.

Endowment Committee will meet later this month.

There was a question about the search for Rev. Nic’s replacement during his sabbatical.

Rev. Nic will share more details later.

### **COSM members (Committee on Shared Ministry) - Defining the Future of UUCA**

Natalia Bowdoin and Melissa Cox facilitated this discussion.

After small discussions, the groups came up with the following values:

- 1 Accepting chaos
- 2 Awe
- 3 Be here now
- 4 Being with, intimately
- 5 Belonging
- 6 Belonging
- 7 Celebration
- 8 Community
- 9 Community
- 10 Connecting of a deep level
- 11 Connection
- 12 Connection
- 13 Culture
- 14 Different people coming together for community
- 15 Establishing connection
- 16 Family – becoming part of something bigger
- 17 Ferment – different ingredients coming together; transformation through diversity
- 18 Finding joy & transformation in the impact of our efforts
- 19 Fulfillment
- 20 Goodness
- 21 Having purpose
- 22 Humanity
- 23 Inexplicable
- 24 Interconnected open-mindedness
- 25 Interconnected web
- 26 Interconnection

- 27 Interdependence
- 28 Loving relationships (small group ministries)
- 29 Nature
- 30 Nature (awe and grandeur)
- 31 Pause in the moment
- 32 Peace
- 33 Peace
- 34 Presence toward it all
- 35 Sincere connection
- 36 Spiritual energy
- 37 Stories & narratives
- 38 Teamwork & synergy beyond
- 39 Transformative perspective
- 40 Unexpectedness
- 41 Valuing states of Life
- 42 Vulnerability
- 43 Vulnerability
- 44 Worthiness

The UU Board of Trustees will use this input for making future decisions.

Dominique Grushinski shared a few words.

Closing words were given by Rev. Nic.

The meeting was adjourned at 2:31 pm.

Respectfully submitted,

Valerie Webster

# Stewardship Committee Report 2025-2026

On behalf of the UUCA Stewardship Committee, I'm pleased to share the results of our 2026–2027 pledge drive.

This year, we continued the approach of allowing previous years' totals to roll over for members who are familiar with the pledging process and did not want their amount to change. This allowed us to take the time to speak with new members who were unaware of all of the programs and groups that the UUCA offers. In this time of uncertainty, understanding the inner workings of our Beloved Community provides peace of mind for newer members.

Thanks to your generosity and commitment, we received **113 pledges**, totaling **\$222,064.88**. That's an **increase of \$22,774 from last year!** I would personally like to offer my sincerest gratitude to all who made this possible.

As part of this report, I'd like to take a moment to encourage everyone to consider setting up ongoing automatic payments in Realm without an end date. This is one of the easiest and most consistent ways to support the congregation's work, helping us to plan more effectively and avoid dips in funding over the course of the year.

Special thanks to those who volunteered at the Pancake Breakfast. I also want to take a moment to thank all the volunteers who dedicated their time and talents to the Pledge Drive: my fellow Co-Chair Chris Grushinski, Dominique Grushinski, Brandy Hicar, and Trania Hamilton.

Thank you again for your ongoing support, your financial generosity, and for continuing to walk this journey of getting into Good Trouble with us.

Whitney Civitarese

Unitarian Universalist Church Of Augusta  
**Statement of Activities (PnL)**

Date Range: Apr 1st 2026 - Apr 30th 2026

Accounts	April	Actual	Annual	Annual	April	Actual	Annual	Annual
	Actual	Jul 01, 2025 -	Budget	Budget	Actual	Jul 01, 2024 -	Budget	Budget
	This Year	Apr 30, 2026	Jul 01, 2025 -	Jul 01, 2025 -	Last Year	Apr 30, 2025	Jun 30, 2025	Jun 30, 2025
			Jun 30, 2026	Apr 30, 2026				Apr 30, 2025
								% Used
<b>Revenues</b>								
4000 Plate Donations Undesignated	1,713.80	21,146.09	11,200.00	188.80 %	1,352.00	8,755.01	10,000.00	87.55 %
4010 Concert Series	180.00	1,630.00	2,750.00	59.27 %	860.00	2,550.00	2,750.00	92.73 %
4025 Fundraising	376.20	8,424.16	8,000.00	105.30 %	527.00	11,043.52	7,500.00	147.25 %
4030 Gifts of Honor	275.00	6,270.00	2,000.00	313.50 %	200.00	825.00	2,000.00	41.25 %
4040 Pledge Income	17,828.29	150,950.02	197,789.00	76.32 %	16,526.00	155,479.88	195,979.00	79.33 %
4150 Bank Interest	0.00	0.00	25.00	0.00 %	2.18	22.24	25.00	88.96 %
<b>Other Income</b>								
4020 Other Income Unrestricted	300.00	9,792.23	14,000.00	69.94 %	0.00	10,591.50	7,000.00	151.31 %
4021 Processing Costs Collected	107.93	1,253.66	0.00	0.00 %	121.29	740.70	0.00	0.00 %
Total Other Income	407.93	11,045.89	14,000.00	78.90 %	121.29	11,332.20	7,000.00	161.89 %
<b>Youth Programs</b>								
4046 OWL	0.00	625.00	1,200.00	52.08 %	0.00	0.00	1,100.00	0.00 %
4047 Summer Programs	110.00	3,198.00	3,360.00	95.18 %	0.00	1,640.00	5,800.00	28.28 %
4048 Parent's Night Out	77.00	723.50	1,600.00	45.22 %	10.00	803.97	1,500.00	53.60 %
Total Youth Programs	187.00	4,546.50	6,160.00	73.81 %	10.00	2,443.97	8,400.00	29.09 %
<b>Building Use</b>								
4051 Fire Station Lease	0.00	0.00	1,500.00	0.00 %	1,500.00	1,500.00	1,500.00	100.00 %
4052 Midday Group/AA	0.00	3,150.00	4,200.00	75.00 %	350.00	3,500.00	4,200.00	83.33 %
4053 Other Rental/Usage Fees	300.00	2,876.93	2,400.00	119.87 %	30.00	1,755.00	2,250.00	78.00 %
4055 Homeschool	0.00	0.00	0.00	0.00 %	0.00	5,400.00	10,800.00	50.00 %
Total Building Use	300.00	6,026.93	8,100.00	74.41 %	1,880.00	12,155.00	18,750.00	64.83 %
<b>Total Revenues</b>	<b>\$ 21,268.22</b>	<b>\$ 210,039.59</b>	<b>\$ 250,024.00</b>	<b>84.01 %</b>	<b>\$ 21,478.47</b>	<b>\$ 204,606.82</b>	<b>\$ 252,404.00</b>	<b>81.06 %</b>
<b>Expenses</b>								
7007 Office Bookkeeper	221.64	1,059.69	0.00	0.00 %	0.00	0.00	0.00	0.00 %
7100 Faith Formation Manager Expense	0.00	648.08	500.00	129.62 %	0.00	320.25	400.00	80.06 %
7150 Staff Development	0.00	606.35	1,300.00	46.64 %	276.00	276.00	1,000.00	27.60 %
8015 Bank Charges / Fess	756.10	5,093.42	2,200.00	231.52 %	166.09	1,915.84	1,704.00	112.43 %
8115 Miscellaneous	1,452.15	1,452.15	0.00	0.00 %	0.00	0.00	0.00	0.00 %
8500 UUA Membership Dues	0.00	2,974.74	12,518.00	23.76 %	2,483.00	12,415.00	12,415.00	100.00 %
8629 Sabbatical Minister Fund Contribution	0.00	0.00	699.00	0.00 %	0.00	0.00	0.00	0.00 %
8700 Board Contingency	0.00	195.10	300.00	65.03 %	200.00	1,095.04	1,201.00	91.18 %
<b>Payroll Taxes</b>								

Accounts	April	Actual	Annual	Annual	April	Actual	Annual	Annual
	Actual	Jul 01, 2025 -	Jul 01, 2025 -	Jul 01, 2025 -	Actual	Jul 01, 2024 -	Jul 01, 2024 -	Jul 01, 2024 -
	This Year	Apr 30, 2026	Jun 30, 2026	Apr 30, 2026	Last Year	Apr 30, 2025	Jun 30, 2025	Apr 30, 2025
6001 Employer FICA/SS	285.98	4,167.74	4,551.00	91.58 %	576.91	3,936.39	4,755.00	82.78 %
6002 Employer Medicare	66.88	956.62	1,051.00	91.02 %	146.62	932.40	1,098.00	84.92 %
Total Payroll Taxes	352.86	5,124.36	5,602.00	91.47 %	723.53	4,868.79	5,853.00	83.18 %
<b>Wages</b>								
7001 Music Director	1,121.21	11,336.49	14,569.00	77.81 %	1,184.50	12,748.40	14,214.00	89.69 %
7002 Jazz Coordination	0.00	275.00	375.00	73.33 %	69.26	294.26	375.00	78.47 %
7003 Faith Formation Manager	1,557.56	16,352.67	17,239.00	94.86 %	1,236.78	14,762.99	17,068.00	86.50 %
7005 Church Administrator	2,385.86	26,549.43	28,000.00	94.82 %	2,337.28	29,028.26	32,445.00	89.47 %
7006 Membership Coordinator	387.32	3,014.44	4,362.00	69.11 %	335.52	2,911.93	3,691.00	78.89 %
7009 Nursery Staff	80.80	1,036.89	2,550.00	40.66 %	0.00	993.87	2,550.00	38.98 %
7010 Childcare (Non-Worship)	0.00	404.52	1,000.00	40.45 %	0.00	363.50	1,000.00	36.35 %
7012 Youth OWL Advisor	126.06	1,343.92	1,680.00	80.00 %	0.00	1,161.81	1,680.00	69.16 %
7014 Tech Deck Coordinator	230.87	1,754.64	2,700.00	64.99 %	200.00	934.70	2,700.00	34.62 %
<b>Minister</b>								
7021 Wages in Lieu of FICA/Med	811.84	7,712.48	4,871.00	158.33 %	2,025.26	18,819.55	4,764.00	395.04 %
7022 Minister Salary & Housing	4,899.90	46,549.17	63,670.00	73.11 %	3,520.84	35,248.40	62,269.00	56.61 %
Total Minister	5,711.74	54,261.65	68,541.00	79.17 %	5,546.10	54,067.95	67,033.00	80.66 %
Total Wages	11,601.42	116,329.65	141,016.00	82.49 %	10,909.44	117,267.67	142,756.00	82.15 %
<b>Minister Other Benefits</b>								
7226 Minister Professional Expenses	0.00	7,478.35	9,500.00	78.72 %	0.00	4,679.35	9,500.00	49.26 %
7228 Minister Life	0.00	43.59	500.00	8.72 %	0.00	408.31	500.00	81.66 %
Total Minister Other Benefits	0.00	7,521.94	10,000.00	75.22 %	0.00	5,087.66	10,000.00	50.88 %
<b>Retirement</b>								
7304 Church Administrator	0.00	0.00	0.00	0.00 %	0.00	1,622.10	3,245.00	49.99 %
7305 Minister	530.58	5,636.38	6,367.00	88.52 %	0.00	3,113.52	6,227.00	50.00 %
Total Retirement	530.58	5,636.38	6,367.00	88.52 %	0.00	4,735.62	9,472.00	50.00 %
<b>Long Term Disability Insurance</b>								
7403 Church Administrator	0.00	0.00	280.00	0.00 %	0.00	246.05	330.00	74.56 %
7405 Minister	0.00	67.46	890.00	7.58 %	0.00	472.22	870.00	54.28 %
Total Long Term Disability Insurance	0.00	67.46	1,170.00	5.77 %	0.00	718.27	1,200.00	59.86 %
<b>Medical Benefit</b>								
7504 Medical Church Administrator	0.00	870.28	2,800.00	31.08 %	0.00	3,090.99	3,245.00	95.25 %
7518 Minister Medical	0.00	1,228.08	2,884.00	42.58 %	0.00	0.00	2,670.00	0.00 %
Total Medical Benefit	0.00	2,098.36	5,684.00	36.92 %	0.00	3,090.99	5,915.00	52.26 %
<b>Insurance Expense</b>								
8001 Multi-Peril & Umbrella Policy	0.00	10,505.70	12,000.00	87.55 %	1,167.30	8,649.10	8,980.00	96.32 %
8003 Workers' Compensation	0.00	0.00	547.00	0.00 %	0.00	453.60	567.00	80.00 %
Total Insurance Expense	0.00	10,505.70	12,547.00	83.73 %	1,167.30	9,102.70	9,547.00	95.35 %

Accounts	Annual Budget				Annual Budget			
	April	Actual	Annual	Annual	April	Actual	Annual	Annual
	Actual	Jul 01, 2025 -	Budget	Budget	Actual	Jul 01, 2024 -	Budget	Budget
This Year	Apr 30, 2026	Jul 01, 2025 -	Jul 01, 2025 -	% Used	Last Year	Apr 30, 2025	Jul 01, 2024 -	Jul 01, 2024 -
		Jun 30, 2026	Apr 30, 2026				Jun 30, 2025	Apr 30, 2025
<b>Office Expenses</b>								
8101 Copier Equipment Rental	356.04	2,566.33	2,115.00	121.34 %	119.35	1,544.76	1,815.00	85.11 %
8102 Office Supplies	86.90	904.43	1,575.00	57.42 %	388.42	952.79	900.00	105.87 %
8103 Postage and Delivery	10.48	10.48	275.00	3.81 %	0.00	135.50	250.00	54.20 %
8104 Telephone, Computer, Internet Expenses	148.01	2,063.85	3,714.00	55.57 %	671.16	2,848.56	3,084.00	92.37 %
8105 Accountant/Bookkeeper Expenses	0.00	483.50	600.00	80.58 %	0.00	470.45	600.00	78.41 %
8106 Social Media & Advertising	18.25	371.43	1,100.00	33.77 %	0.00	630.42	1,230.00	51.25 %
8110 Technology Upgrades & Support	0.00	336.48	400.00	84.12 %	(500.00)	358.27	400.00	89.57 %
8111 Lawncare	0.00	1,800.00	1,800.00	100.00 %	0.00	2,750.00	2,000.00	137.50 %
8113 Subscriptions	256.98	2,588.41	1,750.00	147.91 %	19.99	1,246.30	1,750.00	71.22 %
8114 Building and Grounds	21.69	2,902.11	3,750.00	77.39 %	(3,828.43)	3,970.83	3,490.00	113.78 %
<b>Total Office Expenses</b>	<b>898.35</b>	<b>14,027.02</b>	<b>17,079.00</b>	<b>82.13 %</b>	<b>(3,129.51)</b>	<b>14,907.88</b>	<b>15,519.00</b>	<b>96.06 %</b>
<b>Utilities</b>								
8201 Gas	612.91	2,584.00	2,783.00	92.85 %	297.96	2,785.11	2,625.00	106.10 %
8202 Electric	502.14	7,978.15	7,465.00	106.87 %	471.86	7,074.98	6,220.80	113.73 %
8203 Water	160.92	1,737.64	1,900.00	91.45 %	502.12	1,853.60	1,845.00	100.47 %
8204 City Services	0.00	892.70	594.00	150.29 %	0.00	534.70	594.00	90.02 %
8205 Pest Control	0.00	0.00	200.00	0.00 %	0.00	0.00	200.00	0.00 %
8206 Cleaning Services	0.00	2,577.46	5,850.00	44.06 %	550.00	4,555.00	5,850.00	77.86 %
<b>Total Utilities</b>	<b>1,275.97</b>	<b>15,769.95</b>	<b>18,792.00</b>	<b>83.92 %</b>	<b>1,821.94</b>	<b>16,803.39</b>	<b>17,334.80</b>	<b>96.93 %</b>
<b>Capital Expense</b>								
8402 Multiyear Maintenance Fund	0.00	0.00	300.00	0.00 %	1,377.87	1,377.87	1,675.00	82.26 %
8403 Cash Reserves Funding	0.00	0.00	300.00	0.00 %	0.00	0.00	1,675.00	0.00 %
<b>Total Capital Expense</b>	<b>0.00</b>	<b>0.00</b>	<b>600.00</b>	<b>0.00 %</b>	<b>1,377.87</b>	<b>1,377.87</b>	<b>3,350.00</b>	<b>41.13 %</b>
<b>Programs and Activities</b>								
8607 Pastoral Care	553.03	2,150.63	0.00	0.00 %	0.00	0.00	150.00	0.00 %
8609 Lifespan Faith Formation	113.30	3,021.86	3,900.00	77.48 %	(2,313.86)	3,863.01	3,900.00	99.05 %
8611 Membership	444.06	2,394.30	2,235.00	107.13 %	0.00	327.00	2,000.00	16.35 %
8612 Stewardship / Fundraising	0.00	490.93	1,000.00	49.09 %	0.00	399.37	1,000.00	39.94 %
8613 Good Trouble	0.00	643.11	1,200.00	53.59 %	90.00	432.76	1,200.00	36.06 %
8617 Nominating and Leadership Development	0.00	0.00	250.00	0.00 %	0.00	0.00	250.00	0.00 %
8618 Denomination Activities & Tuition	0.00	0.00	0.00	0.00 %	0.00	0.00	320.00	0.00 %
8619 Worship	175.00	1,705.58	2,200.00	77.53 %	225.00	1,550.63	2,200.00	70.48 %
8621 Music	0.00	1,398.20	2,115.00	66.11 %	0.00	340.00	2,115.00	16.08 %
8627 Sunday Fellowship	0.00	92.80	750.00	12.37 %	0.00	392.78	500.00	78.56 %
<b>Total Programs and Activities</b>	<b>1,285.39</b>	<b>11,897.41</b>	<b>13,650.00</b>	<b>87.16 %</b>	<b>(1,998.86)</b>	<b>7,305.55</b>	<b>13,635.00</b>	<b>53.58 %</b>
<b>Total Expenses</b>	<b>\$ 18,374.46</b>	<b>\$ 201,007.76</b>	<b>\$ 250,024.00</b>	<b>80.40 %</b>	<b>\$ 13,996.80</b>	<b>\$ 201,288.52</b>	<b>\$ 251,301.80</b>	<b>80.10 %</b>
<b>Net Total</b>	<b>\$ 2,893.76</b>	<b>\$ 9,031.83</b>	<b>\$ 0.00</b>	<b>0.00 %</b>	<b>\$ 7,481.67</b>	<b>\$ 3,318.30</b>	<b>\$ 1,102.20</b>	<b>301.06 %</b>

Unitarian Universalist Church Of Augusta  
**Statement of Financial Position (Balance Sheet)**

As of: Apr 30th 2026

Accounts	Balance Mar 31, 2026	Balance Apr 30, 2026	\$ Change	Balance Mar 31, 2025	Balance Apr 30, 2025	\$ Change
<b>Assets</b>						
1000 Bank Account Checking	49,970.34	51,087.50	1,117.16	43,816.71	43,700.24	(116.47)
1075 Bank Account Savings	17,703.97	17,703.97	0.00	17,697.35	17,699.53	2.18
1300 Minister's Fund	625.00	625.00	0.00	325.00	325.00	0.00
<b>Total Assets</b>	<b>\$ 68,299.31</b>	<b>\$ 69,416.47</b>	<b>\$ 1,117.16</b>	<b>\$ 61,839.06</b>	<b>\$ 61,724.77</b>	<b>( \$ 114.29 )</b>
<b>Liabilities &amp; Net Assets</b>						
<b>Liabilities</b>						
2000 Accounts Payable	20,425.36	20,010.00	(415.36)	10,192.61	8,421.36	(1,771.25)
2100 Pledges Upcoming FY / Unearned	650.00	650.00	0.00	(5,550.00)	(5,550.00)	0.00
2150 Refundable Deposits	40.00	40.00	0.00	140.00	140.00	0.00
<b>Payroll</b>						
2051 Payroll Taxes Payable	(6,607.75)	(6,856.60)	(248.85)	(444.86)	(1,792.63)	(1,347.77)
2052 Long Term Disability Payable	(163.14)	(163.14)	0.00	(28.22)	(28.22)	0.00
2053 Medical Premium Payable	(1.10)	(1.10)	0.00	(1.10)	(1.10)	0.00
2054 Life Insurance Payable	(97.59)	(939.98)	(842.39)	(97.59)	(97.59)	0.00
Total Payroll	(6,869.58)	(7,960.82)	(1,091.24)	(571.77)	(1,919.54)	(1,347.77)
Total Liabilities	14,245.78	12,739.18	(1,506.60)	4,210.84	1,091.82	(3,119.02)
<b>Net Assets</b>						
3000 Opening Balance Equity	9,994.58	9,994.58	0.00	9,994.58	9,994.58	0.00
3216 Reese Life Ins. Payout	3,379.95	3,158.31	(221.64)	0.00	0.00	0.00
3500 Unrestricted Net Assets	7,994.91	7,994.91	0.00	5,805.10	5,255.10	(550.00)
<b>Temporarily Restricted Net Assets</b>						
3200 Other Temp Res	1,372.90	1,372.90	0.00	325.00	1,372.90	1,047.90
3202 Multi Year Maintenance Fund - Savings	4,040.21	4,040.21	0.00	3,893.08	3,893.08	0.00
3207 Navigators USA Chapter 95	282.20	282.20	0.00	282.20	282.20	0.00
3212 Soul Circles	0.97	0.97	0.00	0.97	0.97	0.00
3235 Second Sunday	169.25	189.25	20.00	701.00	908.00	207.00
3245 Cash Reserves	17,781.01	20,896.41	3,115.40	1,065.63	9,097.30	8,031.67
3246 Board-Voted Surplus Project	(982.92)	(982.92)	0.00	1,224.00	1,224.00	0.00
3250 Endowment Yearly Income Distribution	600.00	1,100.00	500.00	405.38	405.38	0.00
3269 Memorial Garden	2,508.43	2,508.43	0.00	2,325.43	2,325.43	0.00
3274 Minister's Ins Contingency Fund	5,520.00	5,520.00	0.00	5,510.00	5,588.00	78.00
<b>Special Events</b>						
3203 Final Friday Jazz	1,258.52	433.52	(825.00)	1,559.85	1,333.85	(226.00)
3204 Ecstatic Dance	0.00	0.00	0.00	338.80	338.80	0.00
Total Special Events	1,258.52	433.52	(825.00)	1,898.65	1,672.65	(226.00)
<b>Special Collections</b>						
3201 Indivisible	571.88	571.88	0.00	212.00	348.88	136.88
3205 Christmas Project	210.00	210.00	0.00	210.00	210.00	0.00
3206 Other Special Collections	60.00	195.00	135.00	60.00	60.00	0.00
Total Special Collections	841.88	976.88	135.00	482.00	618.88	136.88
<b>Camp Scholarship</b>						
3208 Camp Scholarship	337.19	337.19	0.00	457.19	457.19	0.00
3209 The Mountain - Youth	2,815.00	2,715.00	(100.00)	2,815.00	2,815.00	0.00
Total Camp Scholarship	3,152.19	3,052.19	(100.00)	3,272.19	3,272.19	0.00
<b>Special Projects</b>						
3210 Archive Project	863.86	863.86	0.00	863.86	863.86	0.00
3211 Signage Project	458.95	458.95	0.00	733.94	733.94	0.00
3213 UU the Vote	234.08	234.08	0.00	234.08	234.08	0.00
3214 Storm Damage	0.00	0.00	0.00	18,611.13	14,789.41	(3,821.72)
3215 Grant	(5,417.44)	(5,417.44)	0.00	0.00	(1,899.00)	(1,899.00)
Total Special Projects	(3,860.55)	(3,860.55)	0.00	20,443.01	14,722.29	(5,720.72)
Total Temporarily Restricted Net Assets	32,684.09	35,529.49	2,845.40	41,828.54	45,383.27	3,554.73
Total Net Assets	54,053.53	56,677.29	2,623.76	57,628.22	60,632.95	3,004.73
<b>Total Liabilities &amp; Net Assets</b>	<b>\$ 68,299.31</b>	<b>\$ 69,416.47</b>	<b>\$ 1,117.16</b>	<b>\$ 61,839.06</b>	<b>\$ 61,724.77</b>	<b>( \$ 114.29 )</b>

FY27 Budget Final Draft 5.22.26		FY 2026 Budget	FY 2027 Budget	% change	NOTES
4000	Plate donations Undesignated	\$10,000	\$13,000	30.00%	2nd sundays - only 6 months
4010	Concert Series	\$2,750	\$3,000	9.09%	6 concerts, ~500 net revenue/concert
4020	Other Income Unrestr.	\$8,000	\$8,000	0.00%	(previous fy pledges, trans. Fees)
4025	Fundraising	\$8,000	\$8,250	3.13%	
4030	Gifts of Honor	\$2,000	\$2,250	12.50%	
4040	Pledge Income	\$199,290	\$222,065	11.43%	% increase:
	<b>Grants</b>	\$0	\$5,000		
	<b>Sabbatical Minister Fund Distribution</b>		\$0		
4045	Youth Program Fees				
4046	Owl Registrations	\$1,200	\$1,200	0.00%	8 primary/single children from same family, 2 second children
4047	Summer Programs	\$3,360	\$3,000	-10.71%	assumes 2 camps, ~7 attendees/camp, & \$120/camp
4048	Parent's Night Out	\$1,500	\$1,000	-33.33%	\$15/student, assumes 5/week for 20 weeks
	<b>Total - 4045</b>	\$4,860	\$5,200	7.00%	
4050	Rent/Building use fees				
4051	Fire station lease	\$1,500	\$1,500	0.00%	
4052	Midday Group/AA	\$4,200	\$4,200	0.00%	
4053	Other rental/usage fees	\$2,250	\$4,780	112.44%	
	<b>4055 - Diane Pond Income (formerly home school)</b>	\$19,750	\$8,000	-59.49%	
	<b>Total 4050 · Rent/Building use fees</b>	\$27,700	\$18,480	-33.29%	
4150	Bank Interest	\$25	\$25	0.00%	depends on interest rates
	<b>Total Income</b>	<b>\$262,625</b>	<b>\$280,270</b>	<b>6.72% Increase:</b>	

FY27 Budget Final Draft 5.22.26		FY 2026 Budget	FY 2027 Budget	% change	NOTES
6000 · Payroll Taxes					
	6001 · Employer FICA/SS	\$4,682	\$5,858	25.12%	
	6002 · Employer Medicare	\$1,081	\$1,353	25.12%	
Total 6000 · Payroll Taxes		\$5,763	\$7,211	25.12%	
7000 · Gross Wages					
	7001 · Music Director	\$14,569	\$14,860	2.00%	~28.51/hour for ~10 hours/week <b>\$28.58</b>
	7001-a jazz coordination (untaxed)	\$375	\$1,800	380.00%	
	7015 Custodian / Sexton		\$13,260		15/hr for ~17 hrs/week, for 52 weeks
	7003 Faith Formation Director	\$17,239	\$17,584	2.00%	~21.24/hour, ~16 hours/week, 52 weeks 2% hourly increase from actual paid in fy26 (adjusted after home school didn't happen)
	7007 <b>bookkeeper</b>		\$3,432		16.5/hr, 4 hrs/week, 52 weeks
	7005 Director of Congregational Life (church administrator)	\$30,750	\$31,000	0.81%	~19.87/hour for ~30 hours/week 10.71% raise for Brandy (currently \$28k)
	7006 - Membership Coord	\$3,691	\$3,765	2.01%	\$17/hr, 4.5 hours/week, 52 weeks
	7009 · Nursery Staff	\$2,550	\$2,750	7.84%	
	7010 - Child Care (non-worship)	\$1,000	\$1,250	25.00%	
	7012 · Youth/OWL Advisor	\$1,680	\$2,520	50.00%	14 hours/month, 15/hour, 12 months
	7014 - Tech Deck Coord.	\$2,700	\$2,860	5.93%	\$60/Sunday for 52 Services
	<b>8629Set aside to pay Sabbatical Minister (untaxed)</b>		\$750		
	7020 - Minister by contract				
	7021 Wages in lieu of FICA	\$4,871	\$4,968	1.99%	
	7022 Minister S&H	\$63,670	\$64,943	2.00%	
	Total 7020 Minister	\$68,541	\$69,912	2.00%	<b>\$2,912.98</b>
Total 7000 · Gross Wages (less sab. & jazz coord.)		\$143,095	\$163,192	14.05%	
Combined sabbatical and jazz coord. (untaxed)			\$2,550		
	7100 · Profess. Exp. ff manager	\$500	\$600	20.00%	
	7150 - Staff/Volunteer Development	\$1,300	\$1,500	15.38%	

FY27 Budget Final Draft 5.22.26		FY 2026 Budget	FY 2027 Budget	% change	NOTES
7225 - Minister Other Benefits					
	7225 Minister Other Benefits - Other	\$0	\$0		
	7226 Minister Prof Expenses	\$9,500	\$9,500	0.00%	
	Sabbatical minister prof expenses		\$0		
	7228 Minister life	\$500	\$500	0.00%	
	<b>Total 7225 Minister Other Benefits</b>	<b>\$10,000</b>	<b>\$10,000</b>	<b>0.00%</b>	
7300 · Retirement					
	7302 · Music Director	\$0	\$0		
	7303 · Family Ministry Director	\$0	\$0		
	7304 · Church Administrator	\$1,538	\$3,100	101.56%	
	7305 - Minister	\$6,367	\$6,494	2.00%	No retirement for first year - starts 7.1.26
	<b>Total 7300 · Retirement</b>	<b>\$7,905</b>	<b>\$9,594</b>	<b>21.37%</b>	
7400 · Long Term Disability Insurance					
	7402 · Family Ministry Director	\$0	\$0		
	7403 · Church Administrator	\$308	\$310	0.65%	
	7404 · Music Director	\$0	\$0		
	7405 - Minister	\$870	\$890	2.30%	
	<b>Total 7400 · Long Term Disability Insurance</b>	<b>\$1,178</b>	<b>\$1,200</b>	<b>1.87%</b>	
7500 · Medical Benefit					
	7504 · Medical Church Admin.	\$5,113	\$3,380	-33.89%	Matches Minister
	7505 · Medical Music Director	\$0	\$0		
	7506 · Medical Family Ministry Director	\$0	\$0		
	7518 - Minister Medical & Dental	\$2,884	\$3,380	17.20%	
	7519 - Minister Dental	\$0	\$0		moved to 7518
	<b>Total 7500 · Medical Benefit</b>	<b>\$7,997</b>	<b>\$6,760</b>		

FY27 Budget Final Draft 5.22.26		FY 2026 Budget	FY 2027 Budget	% change	NOTES
8000 Insurance Expenses					
	8001 · Multi-Peril & Umbrella Policy	\$11,126	\$11,600	4.26%	
	8003 · Workers' Compensation	\$567	\$560	-1.23%	this too
	<b>Total 8000 · Insurance Expense</b>	<b>\$11,693</b>	<b>\$12,160</b>	<b>3.99%</b>	
	8015 - Bank Charges	\$1,704	\$2,200	29.11%	
8100 · Office Expenses					
	8101 · Copier Equipment Rental	\$2,115	\$2,200	4.02%	
	8102 · Office supplies	\$1,575	\$1,600	1.59%	increased cost for family ministry activities
	8103 · Postage and Delivery	\$275	\$275	0.00%	
	8104 · Tel, Computer, Internet	3,714	4,100	10.39%	adding realm accounting
	8105 · Accountant/bookkeeper expense	\$600	\$650	8.33%	
	8106 · Social Media and Advertising	\$1,100	\$1,100	0.00%	
	8113 - Subscriptions	\$1,750	\$2,250	28.57%	soul matters (main, parents, and youth), cvli, one license, zoom
	8110 - tech upgrade	\$400	\$600	50.00%	
	8111 - Lawncare	\$2,000	\$0	-100.00%	per conversation with Jose on 4.22.25
	8114 - Building and Grounds	\$3,750	\$3,950	5.33%	
	<b>Total 8100 · Office Expenses</b>	<b>\$17,279</b>	<b>\$16,725</b>	<b>-3.21%</b>	
8200 · Utilities					
	8201 · Gas	\$2,783	\$2,783	0.00%	locked into rate - 6% higher per fy25 usage
	8202 · Electric	\$7,465.00	\$8,958	20.00%	Approx 20% increase
	8203 · Water	\$1,900	\$2,090	10.00%	
	8204 · City Services	\$594	\$900	51.52%	No increase in FY25, so still figuring same increase from FY26
	8205 · Pest control	\$200	\$150	-25.00%	
	<b>Total 8200 · Utilities</b>	<b>12942</b>	<b>\$14,881</b>	<b>14.98%</b>	
	8206 Cleaning Services	\$5,850	\$0	-100.00%	
8400 · Capital Expense					
	8401 · Mortgage	\$0	\$0		
	8402 -Multiyear Maintenance Fund	\$1,675	\$1,675	0.00%	
	8403 - Cash Reserves Funding	\$1,675	\$1,675	0.00%	savings in case of future deficits
	<b>Total 8400 · Capital Expense</b>	<b>\$3,350</b>	<b>\$3,350</b>	<b>0.00%</b>	

<b>FY27 Budget Final Draft 5.22.26</b>		<i>FY 2026</i>	<i>FY 2027</i>		<b>NOTES</b>
		<i>Budget</i>	<i>Budget</i>	<i>% change</i>	
8500 · Membership Dues		\$13,657	\$12,518	-8.34%	
8600 · Programs and Activities					quote from UUA
8605 · Annual Pledge Drive		\$0	\$0		
8607 · Pastoral Care		\$0	\$150		
8609 · Lifespan Faith Formation		\$4,300	\$4,600	6.98%	Includes adult curriculum
8611 · Membership		\$2,235	\$2,600	16.33%	
8612 · Stewardship (includes pledge)		\$1,000	\$850	-15.00%	
8613 · Social Justice		\$1,200	\$1,200	0.00%	
8617 · N&LD		\$250	\$250	0.00%	
8618 · Denom. Activities & Tuitions		\$320	\$560	75.00%	
8619 · Worship		\$2,200	\$2,375	7.95%	
8621 · Music		\$2,115	\$2,115	0.00%	
8625 · Committee Council		\$0	\$0		
8627 · Sunday Fellowship		\$750	\$750	0.00%	
8628 · COSM		\$0	\$0		
8637 · Sunday morning Transportation		\$0	\$0		
<b>Total 8600 · Program &amp; Activities</b>		<b>\$14,370</b>	<b>\$15,450</b>	<b>7.52%</b>	
8700 · Board Contingency		\$1,201	\$379	-68.44%	
<b>Total Expenses</b>		<b>\$259,783</b>	<b>\$280,270</b>	<b>7.89%</b>	
<b>Total Income</b>		<b>\$262,625</b>	<b>\$280,270</b>	<b>6.72%</b>	
<b>Total Income - Total Expenses = Net Income</b>		<b>\$2,842</b>	<b>(\$0)</b>		<b>(\$0.00)</b>

## 26-27 Board and Congregational Committee Members and Nominees\*

*\*Italics indicate nominees at 2026 Annual Meeting*

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<b>UUCA Board of Directors</b> (2 year terms)	<u>Term ending</u>
LinhThi Do - Co-President <small>(Appointed by board to fill role vacated by Dominique Grushinski)</small>	June 2027
<i>Annie Cook</i> - Co-President	June 2028
<i>Sy Qadri</i> - Secretary	June 2028
Lina Bracci - Treasurer	June 2027
<b><u>Members at Large</u></b>	
<i>Susan Loughrey</i>	June 2028
<i>Lori Sandlin</i> <small>(one year position to fill role vacated by Sy Qadri)</small>	June 2027
<i>Marissa DeOliveira</i> <small>(one year position to fill role vacated by Annie Cook)</small>	June 2027
<b><u>Youth Member</u> (1 year term)</b>	
<i>Rin Cook</i> (Continuing member but still requires vote)	June 2027
<b>Nominations Committee</b> (2 year term)	
<i>Tim Hunter</i> (Past President)	June 2027
Dan Cooper	June 2027
Karin Parham	June 2027
<i>Ruth McClelland-Nugent</i>	June 2028
<i>Bill Webster</i>	June 2028
<b>Endowment Committee</b> (3 year term)	
Elizabeth Bourg	June 2027
<i>Ted Newton</i> (Continuing member but still requires vote) <small>(one year appointment to fill role vacated by Dawn Gavigan)</small>	June 2027
<i>David Lavin</i> <small>(two year appointment to fill role vacated by Danny Wright)</small>	June 2028
<i>Greta Neumann</i>	June 2029
<i>Matt Kridel</i>	June 2029
<b>Memorial Garden</b> (3 year term)	
Tracey Craig	June 2027
Larry Komp	June 2028
Robert Ruiz	June 2028

## **Mission Statement and Five-Year Vision**

(Note, only the mission statement itself is up for congregational vote)

### **Emerging from our shared values,**

**"Our Mission is to create Beloved Community,  
where we are deeply grounded and connected,  
with transformative liberation for all."** *(Roots hold us close and wings set ALL free)*

**In keeping with our Mission, we will make measurable progress toward the following Vision/Ends by June 31<sup>st</sup>, 2031:**

*(Organized by metaphorical ecosystem, from roots to wings then 'within' to 'beyond.' In addition to helping with organization, each parenthetical metaphor will help us make meaning, and facilitate an eventual visual art depiction of our successful work together. The concrete version and abstract version are interchangeable depending on context. This includes the Mission statement itself. The Board will use the following to hold the minister accountable and as guidelines for how to evaluate our shared ministry at UUCA.)*

#### **1. Stability and interconnection** *(Deepening Roots & Mycelium Network)*

##### **— Within —**

- **I will continually and intentionally move with and toward integrity.** *(ROOTS – WITHIN)*
- **I will empower and trust myself to examine the origins of my own ideas and beliefs.** *(ROOTS – WITHIN)*
- **We hold each other and ourselves accountable to our covenants, shared values, and shared Mission.**  
*(ROOTS, TRUNKS, & MYCELIUM NETWORK – WITHIN & AMONG)*
- **As individuals and as a community, we will consistently affirm and embody humility.**  
*(ROOTS & WINGS – WITHIN & AMONG)*

##### **— Among —**

- **We embody the reality: we don't grow alone.** *(ROOTS – AMONG)*
- **We are rooted in our ancestors,** *(VERY MUCH ROOTS, CONNECTED TO...)* **supporting and flying toward the possibility of each next generation.** *(WINGS... BIG TIME.)*
- **We practice a compassionate, effective, and connective system of mutual aid,  
allowing us to survive and thrive through anything.**  
*(INTERCONNECTED ROOTS & TRUNKS, TENDED BY HUMANIST SYMBOLS – AMONG & BEYOND)*

##### **— Beyond —**

- **We offer deep and transformative opportunities for spiritual sustenance and grounding to all who seek it in the CSRA and beyond.** *(VERY MUCH ROOTS – BEYOND)*

## 2. Grace with challenges (*Root-to-Trunk Transitions & Creative Tensions*)

### — Within —

- **We are deeply spiritually grounded** (*VERY MUCH ROOTS – WITHIN & AMONG, CONNECTED TO...*) **allowing us to be present and responsive to a complex world.** (*RISING UP INTO TRUNK WHICH IS SWAYING SLIGHTLY – WITHIN & BEYOND*)
- **We know and affirm: Who we are, individually and collectively, is dynamic;** (*THIS IS STARTING IN THE LOWER TRUNK AND GROWING BOTH UP AND DOWN – WITHIN & AMONG*) **and we exist in the tension between** (*SOMEHOW DISPLAY TENSE CONNECTION BETWEEN THE FOLLOWING IDEAS – EACH OF WHICH ARE A PAIR OF ROOTS AND WINGS*):
  - **Acceptance & curiosity**
  - **Joy & sorrow**
  - **Identity & progress**

### — Among —

- **We effectively practice non-violent communication, always attempting in good faith to repair relationships, without unintentionally reinforcing systems of supremacy and injustice** (*ANOTHER TENDING SYMBOL – AMONG*)

## 3. Community Tending (*The Main Trunk & Ecosystem Tending*)

### — Within —

- **We embody curiosity, humility, and discernment.** (*TRUNKS – WITHIN & AMONG*)
- **We understand: internal and external social identities intersect, creating unique compound experiences of oppression and privilege.** (*TRUNKY – WITHIN, AMONG, & BEYOND*)
- **We live and operate in a way that acknowledges: Our futures are deeply intertwined; which energizes us to become, fostering a sanctuary of everlasting growth.** (*INTERACTION BETWEEN DIFFERENT TRUNKS & VINES IN A WAY WHICH MERGES WITH THE END OF THE NEXT BULLET - WITHIN, AMONG, & BEYOND*)
- **We will have and share the spiritual and practical tools which allow us to set aside everything that prevents us from showing up, so we can meet the unfamiliar and share in everlasting growth.** (*UTILIZE VARIOUS HUMANIST SYMBOLS WITH TOOLS TENDING THE ECOSYSTEM – WITHIN, AMONG, & BEYOND*)
- **We are intentional about seeking growth and nurturing holistic joy.** (*HUMANIST SYMBOLS LOOKING FOR & TENDING ECOSYSTEM – WITHIN, AMONG, & BEYOND*)

### — Among —

- **We are continually discerning stewards of our human and financial resources.** (*ANOTHER TENDING SYMBOL – AMONG*)
- **We always and warmly welcome others to this good faith community the way we were welcomed: truly meeting each person.** (*TRUNKS – AMONG & BEYOND*)

#### 4. Love at the Center *(The Upper Trunk & The Radiant Center)*

— Among —

- **We behave according to this truth: everyone is inherently worthy.** *(NEAR THE TOP OF TRUNKS – AMONG & BEYOND)*

— Beyond / Universal —

- **As embodied Love is at the center of US, we center embodied Love in all we do.**  
*(SUN - (THE SUN AT DUSK OR DAWN – OUR CENTER IS IN A LIMINAL SPACE  
– THE ‘FIRE’ OF A NEGATIVE SPACE CHALICE)*

#### 5. Circle Widening *(Branches & Reaching Growth)*

— Within —

- **We are perpetually transforming and developing with discernment and love** *(TRUNKS AND BRANCHES, PERHAPS HEADING TOWARD THE SUN – WITHIN, AMONG, AND BEYOND)*
- **We are a haven and a beacon for those who have been historically, systematically, and intersectionally oppressed.**  
*(BRANCHES – WITHIN, AMONG, & BEYOND)*
- **Every person is celebrated for who they are, and who they are becoming,** *(BRANCHING OUT – WITHIN, AMONG, AND BEYOND)*  
**with intentional attention for those who are often devalued for who they are.** *(HUMANIST SYMBOLS CHANGING ECOSYSTEM SO SMALLER TREES AREN’T OVERSHADOWED)*

— Among —

- **We welcome everyone who approaches in good faith.** *(AN ARRAY OF COLORS IN THE BRANCHES – AMONG & BEYOND)*

#### 6. Good Trouble *(Canopy & Interconnecting Vines)*

— Within —

- **We make space for the whole of people in this complex world, especially those on the margins,**  
**while celebrating and recognizing their journey** *(CANOPY – WITHIN & AMONG)*
- **We encourage and celebrate transformation within and alongside our community.**  
*(CANOPY MOVING TOWARD WINGS – WITHIN & AMONG)*

— Beyond —

- **We intentionally partner with and support causes and people that align with our values in good faith.** *(VINES CONNECTING CANOPIES – BEYOND)*

## 7. Liberation and Sanctuary in Good Faith (*Wings, Birds, & Open Sky*)

### — Within —

- **I feel bonded and nurtured by community to love and challenge myself.** (*WINGS – WITHIN*)
- **We feel safe enough to share the good news of Unitarian Universalism and our church**  
(*LAYERED WINGS ENVELOPING AND SPREADING WIDE – WITHIN, AMONG, & BEYOND*)
- **Liberation for all, arising from deep within AND the interactions between us. “No one is free until all of us are free.”**  
(*A LARGE BIRD SOARING – WITHIN, AMONG, AND BEYOND*)

### — Among —

- **We make ourselves known to all those who seek connection and desire beloved community.**  
(*WINGS AND CLOUDS, AMONG & BEYOND*)
- **We have made great progress toward full accessibility by adopting universal design.** (*WINGS/CLOUDS – AMONG & BEYOND*)
- **We embody and celebrate the reality: all bodies are beautiful.** (*WINGS/CLOUDS – AMONG & BEYOND*)

# Lead Minister and CEO's Annual Report

Fiscal Year '26

*Rev. Nic Filzen*

As always, I measure our annual accomplishments against our Mission, Covenant, and UU Values. All of which make it clear — Beloved Community is our paramount purpose. And the Love we collectively center and embody is the method.

This has been a year that tested that conviction in ways none of us could have entirely predicted. The political climate hardened. The world grew louder and more frightening. People showed up anyway. You showed up anyway. That is the story of this year.

Below I offer just a few significant highlights from FY26 and connect them with the corresponding threads of our UUCA Covenant, Mission statement, and UU Values.

## Showing Up — Even When It's Hard

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If I had to name a single defining characteristic of this congregation this year, it would be this: you refused to look away. And more than that, you moved.

- The execution of Alex Pretti in Minneapolis in early 2026 was a galvanizing, grief-soaked moment for our wider UU family — and for us. Members of this congregation chipped in so that I could travel to Minneapolis to stand with colleagues on the front lines of what I believe is our tradition's Selma moment. I am still moved by that act of communal generosity. "I truly believe that what happened there and what will continue to happen throughout this country is our Selma moment," and the fact that UUCA sent me there says everything about who we are.
  - **"Our Mission is to create a Beloved Community acting with compassion, reason, and respect, empowering us to promote a just society." — Mission | "We work to be diverse multicultural Beloved Communities where all thrive. We covenant to dismantle racism and all forms of systemic oppression." — UU Values, Justice**
- We marched. We organized. We showed up. Throughout the year, our Good Trouble community was an integral partner in: the "No Kings 2" rally (Rev. Nic delivered the opening invocation), the "ICE Out for Good" event co-hosted with Indivisible and 50501, the MLK Day Parade with the League of Women Voters, the upcoming Pride festival, and — for the first time in our congregation's recent memory — the Juneteenth parade and festival, where we will have our own booth. Members of our BIPOC Caucus, newly launched this year, are leading our Juneteenth presence.
  - **"Live with integrity, embodying our values through practice and play." — Covenant | "Justice: We work to be diverse multicultural Beloved Communities where all thrive. We covenant to dismantle racism and all forms of systemic oppression." — UU Values, Justice**

- The community partnerships we've cultivated — with Indivisible, Growing Forward CSRA, 50501, the League of Women Voters, Protesting for a Cause Augusta, and others — continue to deepen. Many of these groups meet monthly at the church to strategize, organize, and connect. In a moment when isolation is a political tool, we are building the opposite. And for the record, I delivered a “gentle ultimatum” early in the year when two partner groups were in conflict. It's simply not the time for anyone pushing back against fascism to be fighting each other. They heard me. People care.
  - **“Our Mission is to create a Beloved Community... empowering us to promote a just society.” — Mission | “Serve our mission within, among, and beyond us.” — Covenant**

## A Community That Gathers

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Sunday after Sunday, you gathered. And the numbers offer a story worth telling.

- Worship attendance climbed consistently throughout the year, peaking at 154–157 on Easter Sunday — with 42 children in attendance! I believe that may be a single day record. Our Blue Christmas service drew its highest attendance since I've been here — nearly double any previous year. Folks clearly needed its empathetic feeling this year. Many left with tears. That is ministry.
  - **“Our Mission is to create a Beloved Community acting with compassion, reason, and respect.” — Mission | “Support each other's spiritual development, encouraging faith and transformation.” — Covenant**
- We launched a new “Exploring God” series in May — an interfaith dialogue collaboration with Cantor Dan Geigerman of Congregation Children of Israel. It started off with a bang when we hosted Azza El Remessy. I was pleasantly surprised by folks' reception. This series will continue over the next several months — perhaps through the calendar year. It is exactly the kind of work that makes us distinctively UU and genuinely pluralist.
  - **“We celebrate that we are all sacred beings, diverse in culture, experience, and theology. We covenant to learn from one another in our free and responsible search for truth and meaning.” — UU Values, Pluralism | “Seek truth and understanding, exploring with curiosity, reason, and wonder.” — Covenant**
- Our Jazz Series — now rebranded as “The Jazz Series @ UU Augusta” for far more scheduling flexibility — brought multiple concerts to our community and beyond this year, including a show by vocalist Kristi Hood, an evening with L4 Jazz and Mark Rapp, and a super exhilarating season finale featuring Josef and Desafinados. Next year we're planning six concerts, with Lamar Morgan of L4 taking over booking and promotion. The Jazz Series is one of the most joyful things we do. May it continue.
  - **“Live with integrity, embodying our values through practice and play.” — Covenant**

## Forming Good Faith Across Generations

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- This year we completed our first full OWL (Our Whole Lives) program in several years. We started with 15 participants enrolled, though we ended with a few less. With a few exceptions, it ran every Sunday from September through April, facilitated by Desria, Vic Pierce, Annie Cook, and Janeya Filzen — all of whom completed OWL facilitator training this fall. The end-of-OWL celebration with graduate shirts was joy-full. That’s not a small thing.
  - **“Support each other’s spiritual development, encouraging faith and transformation.” — Covenant | “Every person is inherently worthy and has the right to flourish with dignity, love, and compassion.” — UU Values, Equity**
- Our Crossing Paths curriculum took 9 youth on visits to houses of worship throughout the CSRA — Congregation Children of Israel, Lighthouse Christian Fellowship, the Vineyard Church, and others. This is interfaith education in the most embodied possible form. Our awesome kids asked good questions. They came home changed.
  - **“We covenant to learn from one another in our free and responsible search for truth and meaning. We embrace our differences and commonalities with Love, curiosity, and respect.” — UU Values, Pluralism**
- Adult Faith Formation continued robustly throughout the year, aligned with our monthly worship themes, with a special antiracist, antioppressive, multicultural focus in alignment with the board’s annual goal mirroring language in the ‘8<sup>th</sup> principle.’ Sessions on our tradition’s history with colonialism, on white privilege, and on UU ancestors and anti-racism drew strong attendance. Running out of handouts is always a good problem. And we launched the Healing Circle with a covenant grounded in Parker Palmer’s Touchstones for Creating Trustworthy Space. Dominique Grushinsky initiated the group and Bill Webster, Beth Ann Chestnut Fillingham, and Caitlin Tarleton have continued to facilitate.
  - **“Expand our awareness of power and privilege, centering those most burdened by injustice; embrace mutual accountability for our impact, making amends and returning to love.” — Covenant**

## Growing the Circle

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Our membership grew meaningfully this year, climbing to 133 members (with several more who have expressed interest in signing the book imminently), and our pledge drive reached a record \$222,064.88 — the largest pledge total since I’ve been here, and perhaps the largest ever. That is a profound vote of confidence in this community. It humbles me.

- Fern Smith, our Membership Coordinator, has continued to be a vital presence for folks new and long-tenured alike. The newcomer mixers she’s developed created genuine on-ramps into belonging. We also launched our UUCA Network of Care — 59 members initially signed up which was a great start! That said, it has lost some of its initial sizzle and could be reinvigorated. I want to give a special shout out to Lori Sandlin who led the charge when another congregant really needed help moving out of his house before being evicted. What a great model of embodied Love!
  - **“Our Mission is to create a Beloved Community.” — Mission | “Our generosity connects us to one another in relationships of interdependence and mutuality.” — UU Values, Generosity**
- Our bridging ceremony for Zaire Hunter — the first high school senior to graduate during my tenure (who wasn’t a staff member), the first youth board member, and the first young person Desria and I welcomed through Coming of Age four years ago — was one of the most meaningful moments of the year. Full circle. Literally.
  - **“Support each other’s spiritual development, encouraging faith and transformation.” — Covenant | “We covenant to collectively transform and grow spiritually and ethically.” — UU Values, Transformation**

## A Staff Team Coming Into Its Own

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Personnel changes are never easy and are always messier than you expect. This year, we found our footing.

- Branda (Brandy) Hicar came to us as Church Administrator and has grown substantially in the role. I’m proud to say her title has been updated to Director of Congregational Life, which better reflects the scope of what she does and who she is for this community. She is dedicated. Her family loves this church. We are lucky.
  - *Fern Smith now reports to Brandy, reflecting a maturing staff structure.*
- Alice Reese made a \$10,000 gift in honor of her late husband Andy — long integral to us and interfaith life in the CSRA — with the express purpose of funding a bookkeeper position. Kate Williams now serves in that part-time role. Alice’s gift was an investment in our future. That’s exactly what it was.
  - **“We cultivate a spirit of gratitude and hope. We covenant to freely and compassionately share our faith, presence, and resources.” — UU Values, Generosity**

- Desria Seay continues to lead our lifespan faith formation with energy and regional recognition. She was invited by a new Director of Religious Education in Columbia to provide consultation on their program — and I made sure that consultation was compensated equitably. She’s that good. Sadly, she and I had to cancel our trip to the UU Institute for Learning Ministry in January due to severe winter weather throughout the southeast. We probably could have made it out, but we were extra cautious following the devastation of Hurricane Helene last fiscal year.

## Building a Foundation — Literally

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We made significant investments in our building and grounds this year, most of them funded through the GEMA (Georgia Emergency Management Agency) security grant and our own commitment to accessibility and welcome.

- The GEMA security project is nearly complete. New high-tech alarm system with four panic buttons, security cameras, window hardening film, new exterior doors with panic bars and security keypads throughout, electronic doorbells with remote unlocking — it is a transformed building. We are safer. And we moved quickly and deliberately, because the political environment made that urgency real.
- Our rear patio was completely rebuilt — repaved, raised, and fitted with ADA-compliant ramps to the labyrinth and memorial garden. Our building is more accessible than it has ever been. The stained glass windows that once flanked our front doors have been framed and now hang in the sanctuary. The bathrooms are freshly painted, thanks to Lori Sandlin and Greta Neuman.
- And we have a new LED sign — funded by the remaining balance from the signage restricted account funded by several folks not long after I arrived, and the remainder of the advertising budget for the year. The “in this church we believe” banner will move to the side wall along with new signage indicating who we are funded by Richard Dillenbeck — a departing gift as he permanently moved to Maine to be with family.

People in Augusta know who we are. Multiple folks have told me, unprompted, “Oh, you’re the church with that sign.” Good. We should be known.

- **“We covenant to use our time, wisdom, attention, and money to build and sustain fully accessible and inclusive communities.” — UU Values, Equity | “Love and affirm each other and our planet, celebrating multicultural, interdependent wholeness.” — Covenant**

## Something New on the Horizon

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The most exciting development of this year may be one that most of the congregation doesn’t fully know about yet. And I’m glad to tell you about it now.

- Diane Smith has offered her Hepzibah property for UUCA’s use — and we’re in the process of having the property deeded to the congregation now, while she maintains ownership. Desria and Janeya Filzen are envisioning “an intentional UU spiritual retreat experience for UU youths in the region.” It is mission-driven AND income-generating. We are planning silent retreats, group retreats, and perhaps even a bluegrass/folk festival. An endowment request for initial capital improvements is being prepared.
  - *This vision is also, in part, a response to the regional UU youth cons that leave a great deal to be desired — programs that are frequently inaccessible to kids with disabilities, are bipoc, or who live in poverty - and serve almost entirely white kids. We were the only church to send any kids of color to a recent con. We can do better. We will do better. We have the resources to make it happen.*
  - **“We work to be diverse multicultural Beloved Communities where all thrive.” — UU Values, Justice | “We covenant to use our time, wisdom, attention, and money to build and sustain fully accessible and inclusive communities.” — UU Values, Equity**

## Looking Ahead

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There is much more I could say. The interfaith relationships we’ve deepened — with CCI, with Sacred Heart, with Lighthouse Christian Fellowship, with the Augusta Muslim community. The Community Sings that Bill Webster launched, including a caroling trip to a local assisted living facility. The BIPOC Caucus! I was also elected President of the Southeast UU Ministers Association — an honor I accepted, because our regional relationships matter.

And yes: my sabbatical has been delayed one year, to late summer/early fall of 2027. I made that call deliberately — because the midterms matter, because our retreat center is just launching, because our staff team needs more runway, and because you deserve a minister who leaves only when the ground is stable. I intend to be very intentional about planning it over this next year to ensure it actually happens.

A capital campaign is on the near horizon. Our incoming board will begin thinking about it. We have the momentum and, I believe, the will.

This community is remarkable. Not because we have it all figured out — we decidedly do not. But because when the world gets harder, *we don’t retreat. We plant signs. We march. We give of ourselves in ways that fund the future.*

As we move into the year ahead, may we continue to both deepen and widen the impact of our Love in this world.

In good faith and good trouble,

**Rev. Nic Filzen**

# Security Grant Progress Report

Date: June 5, 2026

Project Status: Near Completion

Total Grant Funding: \$135,765.00

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## Executive Summary

This report highlights the progress of the campus-wide security hardening initiatives funded by the Georgia Security Grant. The project focus covers physical security upgrades, active security monitoring, access control, and improving emergency evacuation routes. To date, most of the planned improvements have been successfully completed and operational. The project is now transitioning into its final phase, with only parking and main entrance vehicle intrusion prevention.

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## 2. Financial Overview

Financial Metric	Amount	Notes
Total Grant Funding	\$135,765.00	Initial approved grant allocation
Total Funds Expended to Date	\$130,000.00	Covers all completed physical & digital installations
Reimbursements Received (GEMA)	\$36,331.43	Funds successfully recovered
Reimbursements Requested (Pending)	\$44,723.67	Awaiting processing from GEMA

<b>Remaining Project Costs</b>	<b>\$7,238.00</b>	<b>Allocated for remaining bollards and 1 year prepaid ADT servicing</b>
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**📌 Note: Additional funded projects are still being prepared to be submitted for further GEMA reimbursements to maximize the recovery of the \$130,000.00 spent.**

**Completed Projects**

The following security measures have been fully completed and are currently operational:

**1. Physical & Structural Security**

- **Playground Privacy Fencing & Locks:** Installed high-quality privacy fencing combined with secure locking mechanisms around the playground area to restrict unauthorized access.
- **Window Hardening & Tint Film:** Applied specialized safety hardening and privacy tint film to all public-accessible windows across the campus, drastically reducing external visibility and increasing forced-entry resistance.
- **Sanctuary Emergency Exit:** Installed a brand-new, dedicated emergency exit door near the Sanctuary to alleviate egress bottlenecks.
- **Kitchen Door Reinforcement:** Replaced the legacy kitchen door with a heavy-duty, secure metal door designed to open outward, optimizing emergency exit flow and structural integrity.

**2. Surveillance, Monitoring & Alarm Systems**

- **Campus-Wide Camera System:** Deployed a network of 16 high-definition security cameras covering both internal facilities and external campus grounds.
- **ADT Alarm & Monitoring Infrastructure:** Fully integrated a centralized ADT Alarm & Monitoring System to provide 24/7 professional threat detection and emergency dispatch.
- **Window & Motion Sensors:** Equipped all campus windows with comprehensive motion and entry sensors connected directly to the primary alarm network.
- **Panic Button Deployment:** Strategically positioned 3 rapid-response panic buttons throughout the main building for instantaneous emergency signaling.

### 3. Access Control & Egress Upgrades

- **Keyless Entry Network:** Outfitted all primary exterior doors with secure, code-managed keyless entry hardware, eliminating physical key vulnerabilities.
- **Panic Push Bars:** Retrofitted exit doors with commercial-grade panic push bars to ensure seamless, tool-free exiting during a crisis.
- **Patio & Accessibility Infrastructure:** Raised and resurfaced the patio area near the fountain. This structural improvement provides fluid, unobstructed access to the two new ramps leading directly to the Labyrinth and Memorial Garden safe muster points.

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### Remaining Projects

The final phase of the grant execution focuses exclusively on vehicle mitigation and main entrance perimeter safety:

Project Description	Target Area	Status
<b>Main Entrance Bollard Installation</b>	Pedestrian ramp leading to the main entrance	Pending scheduling / installation
<b>Campus Perimeter Bollards</b>	General parking area grounds	Pending scheduling / installation

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### Next Steps

1. Finalize bollard placement plans and schedule installation with the contractor.
2. Complete physical installation of the bollards at the main ramp and parking areas.
3. Finalize the 1-year service contract with ADT to secure continuous monitoring.
4. Submit outstanding documentation for remaining eligible project reimbursements to GEMA.
5. Execute a final walkthrough of all installed systems to sign off on grant compliance .

# Board of Trustees Report 2025-2026

This year, the Board focused its efforts on deepening our understanding of *Beloved Community* and refining our vision statement. Using the “**Nested Bowls**” framework as a guiding principle, we explored how our values are lived at multiple levels—from the individual to our congregation and outward into the broader community.

More importantly, our mid-year meeting centered on an even more valuable resource: all of you. Through your input and participation, we were able to further shape and define our shared vision. Common themes emerged clearly, including **community, curiosity, diversity, and spirituality**. These insights have helped ground our work in the lived experiences and hopes of our congregation.

This year, we also held an **Endowment Town Hall** to strengthen understanding of the role the endowment plays in supporting the church. With the guidance of an outside consultant and the dedicated efforts of the Endowment Committee, we believe we are now in a much stronger and more unified position. This has been a passionate topic, and we are deeply grateful to everyone who engaged in this process with honesty, openness, and good faith.

We are pleased with the creation of our **BIPOC group** this past year. There was broad understanding of its importance, and we look forward to seeing it evolve to support and strengthen our small but growing BIPOC community.

We also celebrated our first **Family and Friends Day** with a fish fry on Earth Day. It was a wonderful success for both our church and the wider community, and we look forward to making it an annual tradition.

We extend our sincere gratitude to **Diane Smith** for her generous gift of *Diane Pond* to our church. The Board has already begun exploring ways to thoughtfully steward and use this property in alignment with our mission. During a recent retreat, Board members had the opportunity to visit the property—it is truly beautiful, and we are excited about its possibilities.

A heartfelt thank you goes to the **Stewardship Committee** for another successful auction and pledge drive. Your efforts continue to sustain and strengthen our church’s work.

We are encouraged to see that **attendance is growing**, and more people are discovering our church. This affirms that we provide a meaningful and important service to our

community. Under **Nic's leadership**, and with the dedication of our congregation, we are confident that this growth will continue.

We would also like to recognize **Liz Goodson** and **Richard Dilenbeck**, who have recently moved away. Both have contributed greatly to our church over many years—whether making cookies, cutting trees, or lending their time and talents in countless ways. We are deeply grateful for all they have given.

Finally, we would be remiss not to honor **Andy Reese**, a true pillar of both our church and the broader community. He is greatly missed. Through his wife, Alice, his legacy continues to make a lasting impact, for which we are forever thankful.

As we look ahead, we are filled with gratitude for all that we have accomplished together. Let us continue building on this momentum and make the coming year even more meaningful and impactful.

**Thank you to each and every one of you who helps make this community what it is.**

## **Memorial Garden Committee Report 2025-2026**

Our Building and Grounds crew recently mowed and cleaned the Memorial Garden, which is now significantly more accessible thanks to the newly completed door, raised fountain patio deck, and aluminum ramp. Please note that the garden's natural atmosphere has shifted; following Hurricane Helene, the area is no longer shaded and receives much more direct sunlight.

Additionally, two blank memorial stones were temporarily removed for professional engraving. They will be reinstalled into the stone matrix as soon as ground conditions are dry enough. One stone honors Andy Reese, whom we lost on November 8, 2025; a memorial interment service is currently being planned for the near future. The second stone has been engraved with Alice Reese's name and will remain in place, with further details to be completed in the distant future.

The current balance in our Memorial Gardens fund is \$2,608.43.

Larry Komp, Memorial Garden Committee Member

## **Endowment Committee Annual Report 2025-26**

The Endowment Fund Committee (EFC) met 6 times this Fiscal Year. This was during the months of August, October, and November 2025, and January and April 2026. This also includes a joint ZOOM seminar with the board during October 2025. In addition, the Committee met with

In October, we agreed to meet with Board members for the Stewardship Seminar by Lydia Ferrante-Roseberry (10/3/2025). This presentation clarified a number of issues (conflicting language, need for clarification of terms) regarding endowments, as well as setting a path forward for the committee to resolve some issues related to our current Endowment Resolution and Guidelines.

Betty Bourg pursued engaging a CPA to audit our books as required by the Guidelines. We were unable to find a firm that was either able to perform our audit or able to do it at a cost we could afford. We ultimately recommended to Board to be a part of their annual financial review and to request a change in the Endowment Guidelines from “annual audit” to “annual audit or review.”

The Committee also defined the Principal/Corpus as the amounts donated to the Endowment Fund. A great unknown was the donors to the Endowment Fund over the years that formed the Principal/Corpus. This was an extremely important value to know as it delineated the amount in the Fund that would be invested but would not be distributed. The list and donation amounts had been compiled by previous Fund Committees, but that process stopped in 2019. The list was retrieved, and research in compiling donors was continued by the current committee through 2026. The current list of donors, date of donation, amount, and any reasons for donation (memorial, etc.) was placed in a password-protected Excel document and given to the Director of Congregational Life (DCL) along with the Password. The DCL will maintain this list going forward as she/he is the initial recipient of all donations and will notify the EFC of the donation for processing through our investment company. The Principal/Corpus will now be reported to the Congregation at every Annual Meeting during the EFC Report.

At that time, the Committee realized the importance of maintaining the privacy of that information and other information regarding church members, but we realized the church did not have an explicit privacy policy regarding church member information. The Committee developed one that could apply to all church member information and sent the policy to the Board for review and approval.

The Committee officers felt that our roles as stated in the Endowment Guidelines were very general and did not reflect what they did. Each officer developed a more complete list of their roles and responsibilities and put them into an internal Committee document. When the time comes to nominate and accept such a role, each person doing so will

have a clear picture of what they are expected to do as chairperson, recording secretary, and financial secretary. These were forwarded to the Board for their information.

In addition to our normally scheduled meetings, the EFC held 2 meetings with South State LPL Investment Officer administering our Fund, advisor Wayne Bissel, during this fiscal year. These meetings were to discuss the Fund and our opportunities to improve our return, one in January 2026 and one in April. He provided information regarding investment options and answered our questions. During our January 18, 2026, EFC meeting, we discussed the considerable amount of cash in our Fund and how it was giving a paltry return. To let those funds grow yet have them be liquid without having to sell shares of stock, we agreed to explore Index Funds that have lower administrative costs, financial stability during market fluctuations, and ease of accessing funds when needed. At the April EFC meeting, based on unanimous approval by the Committee, we had an April meeting with Mr. Bissell and opened a Vanguard Index Fund account and placed \$30,000 in that account, keeping the remaining cash as cash in the LPL account.

The culmination of our Endowment Seminar discussions, meetings, and decisions was a revision of the Endowment Resolution of 2001 and the Endowment Guidelines. The revisions more closely aligned the Endowment with the church's mission, clarified information in the Resolution and Guidelines, corrected some grammar, and provided more leeway in the division of annual distribution from the Endowment.

At the end of the 2025-2026 Fiscal Year, the Principal/Corpus of the Endowment Fund is \$159,095.00. Slide 1 shows the distinction between the Principal and the investment income from the Principal. Slide 2 shows the distribution of the Fund's investments. Slide 3 shows the growth of the fund with a beginning balance in June 2025 of \$231,730.98. The ending balance of the Fund at the end of May 2026 is \$262,341.63. \* This is an increase of \$30,610.65 in the value of the Fund over the Fiscal Year, so far.

The Distribution for 2025 from the Fund's investments (Dividends + Income) was \$9,657.49. Based on the Endowment Resolution and the Endowment Guidelines, this would make \$4,828.74 available for reinvestment into the Fund and the same amount for distribution to the church, with \$1000 going into the church's Multi-Year Maintenance Fund and \$3,828.75 to the General Fund.

\*The amount shown is from the May 2026 LPL Statement. The June LPL Statement was not available for the June Annual Congregational Meeting, and the true End-of-Fiscal-Year amount would not be available until mid-July 2026.

## Endowment Resolution

### A. Resolution to Implement the Endowment Fund

WHEREAS, stewardship serves our Mission through the faithful management of all the gifts we have been given— time, talents, the created world and money, including *accumulated, inherited, and appreciated resources*; and

WHEREAS, we can support the ministry of this Congregation through bequests in wills, charitable remainder and other trusts, charitable gift annuities, assignment of life insurance, and transfers of property (cash, stocks, bonds, real estate); and

WHEREAS, the Congregation desires to encourage, receive, and administer these gifts in a manner consistent with the loyalty and devotion expressed by the grantors and in accord with the Mission and policies of this Congregation:

THEREFORE BE IT RESOLVED, that this Congregation, in its annual general meeting in June 2001, *approved and established* on the records of the Congregation a new and separate fund to be known as THE UNITARIAN UNIVERSALIST CHURCH OF AUGUSTA, GEORGIA ENDOWMENT FUND, hereafter called the FUND;

BE IT FURTHER RESOLVED, that the *purpose* of this FUND is to enhance the Mission of the Congregation *apart from* the general operation of the Congregation; that no portion of the income generated by from FUND shall be used for the annual operating budget of the Congregation, with the possible exception of extreme, temporary, and difficult circumstances, and where integrity of gift restrictions permit, may this Congregation, by action in meeting assembled, use a portion of the FUND *income in service of the Church's ongoing Mission*, and that, except where authorized otherwise in the terms of the gift, *all principal/corpus amounts will be retained and only the income expended*;

BE IT FURTHER RESOLVED, that the Endowment Fund Committee (hereinafter called the “COMMITTEE”) shall be the steward of the FUND;

BE IT FURTHER RESOLVED, that the following Plan of Operation set forth the administration and management of the FUND.

### B. PLAN OF OPERATION

#### 1. THE COMMITTEE

The COMMITTEE shall consist of five members who are not of the same household, all of whom shall be voting members of The Unitarian Universalist Church of Augusta, Georgia. Except as herein limited, the term of each member shall be three (3) years. Upon adoption of this resolution by the Congregation, it shall elect five (5) members of the COMMITTEE: two (2) for a term of three (3) years; two (2) for a term of two (2) years; and one (1) for a term of one (1) year. Thereafter, at each annual meeting, the Congregation shall elect the necessary number for a term of three (3) years. *No member shall serve more than two consecutive three (3) year terms.* After a lapse of one (1) year, former

COMMITTEE member may be re-elected. The minister and co-presidents of the Church Board shall be advisory members of the COMMITTEE. The Church Nominating Committee shall nominate members for election at the annual Congregational meeting in the same manner as for other offices and committees. In the event of a vacancy on the COMMITTEE, the Board shall appoint a member to fill a vacancy until the next annual meeting of the Congregation, at which time the Congregation shall elect a member to fulfill the term of the vacancy.

The COMMITTEE shall meet at least quarterly, or more frequently, as deemed by it in the best interest of the FUND. A quorum shall consist of three (3) members. A majority present and voting shall carry any motion or resolution.

The COMMITTEE shall elect from its membership a *Chairperson, Financial Secretary, and Recording Secretary*. The Chairperson, or member designated by the Chairperson, shall preside at all committee meetings.

The Recording Secretary shall maintain complete and accurate minutes of all meetings of the COMMITTEE, and supply a copy thereof to each member of the committee and to the church archive and Church Administrator. The Secretary shall also supply a copy of the minutes to the Church Board.

The Financial Secretary shall assist the Congregation's treasurer in maintaining complete and accurate books of accounts for the FUND and shall sign checks and all other necessary documents on behalf of the Congregation in furtherance of the purposes of the FUND. The books shall be audited [or reviewed](#) annually by a certified public accountant or other appropriate person or group who is *not* a member of the COMMITTEE. (e.g. a reciprocal agreement with another UU Church).

The COMMITTEE shall report on a quarterly basis to the Board and, at each annual meeting of the Congregation, shall render a complete report of the administration of the FUND during the preceding year, including a plan for the annual income and distribution.

The COMMITTEE may request other members of the Congregation to serve as advisory members and, at the expense of FUND income, may provide for such professional counseling on investments or legal matters as it deems to be in the best interest of the FUND.

Members of the COMMITTEE, shall not be liable for any losses which may be incurred upon the investments of the assets of the FUND except to the extent such losses shall have been caused by bad faith or gross negligence. No member shall be personally liable as long as he/she acts in good faith and with ordinary prudence. Each member shall be liable only for his/her own willful misconduct or omissions, and shall not be liable for the acts of omissions of any other member. No member shall engage in any self-dealing or transactions with the FUND in which the member has direct or indirect financial interest and shall at all times refrain from any conduct in which his/her personal interests would conflict with the interests of the FUND.

*All assets are to be held in the name of the Unitarian Universalist Church of Augusta, Georgia Endowment Fund.*

Recommendations to hold, sell, exchange, rent, lease, transfer, convert, invest, reinvest, and in all other respects to manage and control the assets of the FUND, including stocks, bonds, debentures, notes, or other securities, as in their judgment and discretion they deem wise and

prudent, are to be made by the COMMITTEE and reported to the Church Board upon request, with subsequent execution by the delegated member of the COMMITTEE.

## 2. DISTRIBUTION OF INCOME

The COMMITTEE shall determine what is principal/corpus and income according to accepted accounting procedures. Gifts and bequests to the FUND form the principal/corpus. The income generated from the investment of the principal/corpus may be expended but not below the principal/corpus. Income from the FUND shall be distributed annually and reported at the Annual Meeting, or at other times if deemed necessary, and shall be used for, but not limited to the following purposes:

A. The physical plant of the Church, such as maintenance of buildings, capital improvements or renovations, or debt reduction.

B. Outreach into the community, including, but not limited to, grants to UU camps and conferences, theological schools, local social service agencies or institutions to which this Congregation relates, and to special programs designed for those persons in our community who are in spiritual and/or economic need.

C. The wider mission of Unitarian Universalism, including but not limited to, grants to the UUA for new church development, world mission, or capital financing; OR, scholarships for theological school students, UU camps and conferences, leadership training, or other such training which enables members and/or employees of this Congregation to grow in faith and service to Unitarian Universalism.

Uses of income from the FUND shall be recommended by the COMMITTEE and *approved* by the Board. Suggestions or funding requests are due by the end of the month prior to the end of each fiscal quarter.

## 3. AMENDING THE RESOLUTION

BE IT FURTHER RESOLVED, that any amendment to this resolution, which will change, alter, or amend the purpose for which the FUND is established, shall be adopted by a *two-thirds vote* of the members present at Annual or special meeting called specifically for the purpose of amending this resolution.

## 4. DISPOSITION OR TRANSFER OF FUND

BE IT FURTHER RESOLVED, that in the event the Unitarian Universalist Church of Augusta, Georgia ceases to exist either through merger or dissolution, disposition, or transfer of the FUND shall be at the discretion of the Church Board in conformity with the approved Congregational constitution and in consultation with the Unitarian Universalist Association.

## C. INVESTMENT GUIDELINES

As stated in the Endowment Resolution of 2001, the purpose of the Endowment Fund is “to further the mission of the Congregation apart from the general operation of the Congregation” and the Endowment Fund Committee “shall be the steward of the Fund”. It further indicates that no portion of the income generated shall be used for the annual operating budget. A portion of the Fund income may be used by the Congregation in service of the Church’s ongoing Mission.

The principal/corpus that forms the basis of the fund is not to be expended. An ongoing list of principal/corpus Fund donors, dates of donation, donation amounts, and purpose of donation, if any, is maintained by the UUCA Director of Congregational Life in a password-protected file. The amount of the principal/corpus is to be reported to the Congregation at each Annual Congregational meeting.

The function of the Endowment Committee is to:

- 1) Manage incoming funds accruing from donations and the interest from investments,
- 2) Invest such funds appropriately, and
- 3) Evaluate requests for distribution of income to make recommendations to the Board.

### GUIDELINES

A. The Committee will create a cash flow portfolio of investments based on stability, interest rate, risk factors, portfolio diversity, and consideration of Socially Responsible Investment (SRI). The Unitarian Universalist Association socially responsible investing guidelines should “favor investments in companies that demonstrate positive environmental practices, respect for human rights, labor rights and other legal and ethical standards, and have good relations with employees, customers and the community.”

*"Socially Responsible Investment Guidelines."* Unitarian Universalist Association,  
Published online 23 May 2014. Retrieved 20 Nov. 2015.

<http://www.uua.org/documents/csri/guidelines.pdf>.

B. The portfolio of investments is derived from donations to the Fund, forming the principal/corpus, which is invested and accumulates investment income in the form of an annual income and distribution (AI&D). The Committee can inform the Board and Congregation of the distribution from the fiscal year ending in December. No more than 50% of AI&D should be used for reinvestment into the endowment fund portfolio. No more than 50% of the AI&D should be used for distribution to the church. These percentages may be adjusted based on the financial situation of the Fund or the Mission needs of the church.

For a distribution other than a 50:50 split:

- If the COMMITTEE makes a recommendation based on the financial situation of the Fund or the Mission needs of the church and the Board approves the recommendation, it goes to the Congregation at the Annual Meeting to be voted on as per By-laws.
- If the Board requests that the COMMITTEE increase their share of the Distribution based on the needs of Mission and the FUND could support that, the COMMITTEE could recommend approval, and it would go to the Congregation at the Annual Meeting to be voted on as per By-laws.
- If the FUND is not able to support a 50% distribution to the church in a particular year, the COMMITTEE would tell the Board of the reasons why and request a lower percentage and if the Board approves the request, it goes to the Congregation at the Annual Meeting to be voted on as per By-laws.

C. Return on investment and social responsibility often compete with each other, but both are

vital to our mission. The Committee shall make a good faith effort to find a good balance between rate of return and social responsibility.

D. Members of the Congregation who are concerned about the Committee's investment decision process are welcome to request involvement with the Committee. Also, they may object to a specific investment in writing to the Board, and the Board will review the objection in conjunction with the Endowment Committee to make a decision about if or when it should be terminated.

#### D. ADOPTION OF RESOLUTION

This resolution, recommended to the Church Board and accepted by the Congregation at a legally called Congregational meeting, is hereby adopted.

Unitarian Universalist Church of Augusta, GA by Tim Hunter and Linh Thi Do,  
Co-Presidents

and Valerie Webster  
Secretary

Dated this 14<sup>th</sup> day of June 2026

Appendix A

Endowment Fund Request Form

Short Name of Request:
(for ease of referral)

Original request Resubmitted request with additional information

Requestor: Date of Request: Amount of Request:

REQUESTOR CHECKLIST (initial and include responses with this form) 1.

Description of what the money will be used for and why it is important to the church. 2.

Breakdown of costs (be as specific as possible)

3. Funding Exploration - Are there other options for partial or complete funding? (e.g. committee funds, maintenance funds, volunteer labor, grant, etc.).

4. Effect on others - What will be the effect on other committees or programs of the church? (e.g. increased or decreased work for building and grounds? affect spaces for R.E.? etc.). Please indicate who you have talked to and include their responses.

5. Have local experts been consulted to ensure the most efficient and careful use of funds? If so, please indicate who you have talked to and include their responses.

ENDOWMENT COMMITTEE CHECKLIST

Committee Review Date

- A. Approved by committee and sent to Board for approval
B. No funding available and will retain for next review cycle
C. Additional information requested (include with this form)
D. Not approved (include explanation with this form)
E. Other

Amount approved:

Board Review Date

- A. Approved
B. Additional information requested
C. Not approved

Committee Notified:

Requestor Notified:

Check provided: