

First Congregational Society, Unitarian
Chelmsford, MA 01824

STATE OF THE SOCIETY MEETING

October 6, 2024



Link and connect info for the SoS meeting:

<https://www.uuchelmsford.org/congregational-meeting/>

Join Meeting: <http://meet.google.com/xwv-mmwf-ovt>

Or dial: (US) +1 209-425-2198 PIN: 817 423 032#

Topic: First Parish State of the Society Meeting

Time: October 6, 2024 11:30 AM Eastern Time (US and Canada)

Table of Contents

Pg. 1	Meeting Warrant
Pg. 2	Minutes of Annual Meeting 6/9/2024
Pg. 4	Auditor's Report
Pg. 5	Treasurer's Report
Pg. 6	Collector's Report
Pg. 7	Board of Investment Report

Staff Reports

Pg. 9	Minister
Pg. 13	Lifespan Faith Formation Director
Pg. 17	Music Director
Pg. 19	Office Assistant and Building/Events Coordinator

Committee Reports

Pg. 20	Building Committee
Pg. 21	Grounds Committee
Pg. 22	Membership and Hospitality
Pg. 23	Music Committee
Pg. 24	Pastoral Care and Service Team
Pg. 25	Sabbatical Committee
Pg. 26	Website and Publicity
Pg. 27	Welcoming Congregation
Pg. 28	Worship Committee

WARRANT

The State of the Society Meeting of the First Congregational Society (Unitarian) will be held on Sunday, October 6, 2024 at 11:30AM in person and via Google Meet to act on the following articles:

ARTICLE I.	To elect a moderator (Sanctuary) & assistant moderator (Google Meet)
ARTICLE II.	To vote on the admission of new members.
ARTICLE III.	To vote to accept the Minutes of the Annual Meeting held June 9, 2024
ARTICLE IV.	To vote to accept the Auditor's Report for FY2024
ARTICLE V.	To vote to accept the Treasurer's Report for FY2024
ARTICLE VI.	To vote to accept the Collector's Report for FY2024
ARTICLE VII.	To vote to accept the Board of Investment Report Report for FY2024
ARTICLE VIII.	To vote on an amendment to the FY2025 Congregational Budget.
ARTICLE IX.	To hear a presentation from the Spirit of Life Project team. No vote will be taken.
ARTICLE X.	To open discussion to any other issues of concern to the members. No vote will be taken.
ARTICLE XI.	To vote to adjourn.

A True Copy Attest



Rose Lerer, Clerk

Draft Minutes from Annual Meeting held June 9, 2024:

Minutes of the Annual Meeting of First Parish June 9, 2024

The Annual Meeting of the First Congregational Society (Unitarian) was held on Sunday June 9, 2024 at 11:30am.

Quorum: A quorum of 25 is required. There were 42 people in the sanctuary, 3 people participating online, and 8 absentee ballots.

Standing Committee Chair Neil Harmon opened the meeting with Article I.

ARTICLE I. To elect a moderator and an assistant moderator.

Joan Coyne made a motion and Brian Snow seconded the motion. Debra Grad was elected and Neil Harmon served as assistant moderator. The vote was unanimous in favor.

ARTICLE II. To vote on the admission of new members.

Clerk Rose Lerer made a motion to approve Susan Tripathy and Elaine Mahoney as members. John Schneider seconded the motion. The vote was unanimous in favor.

ARTICLE III. To vote to accept the minutes of the Special Congregational Meeting held Dec. 10, 2023.

Diana Keohane made a motion and Nancy Kaelin seconded the motion. There were two abstentions because the two people were not at the December 10th meeting. The motion was approved unanimously.

ARTICLE IV. To vote on the nominated candidates for the 2024-2025 church year.

Office:

Nominee:

Standing committee (3 year term)	Ron Deschenes
Standing committee (1 year of a 3 year term)	Gail Burati
Standing committee (1 year term)	Tom Coffey
Treasurer (1 year term)	David Kaffine
Assistant Treasurer (1 year term)	Neil Harmon
Clerk (1 year term)	Rose Lerer
Collector (1 year term)	Carla Corey
Nominating Committee (1 year term)	Jeanette Moreau
Nominating Committee (3 year term)	Andrea Long
Nominating Committee (3 year term)	Beth Benoit
Board of Investment (4 year term)	Ramon Cervantes

Lisa Calvo made a motion and Diana Keohane seconded the motion. The motion was approved unanimously.

ARTICLE V. To vote on the proposed Fiscal Year 2025 budget.

Treasurer Dave Kaffine explained the budget. The budget is \$9,000 greater than last year. The budget has a \$10,000 deficit but Dave has seen this in the past and we have no deficit at the end of the year. There was a large cost of living increase for the staff.

Dave Kaffine made a motion and Carolyn Snow seconded the motion. The motion was approved unanimously.

ARTICLE VI. To vote on the proposed Fiscal Year 2025 Use of Cell Tower Revenue budget.

Treasurer Dave Kaffine explained that the vote was just for the service and there are funds for the Spirit of Life project.

Rose Lerer made a motion and Leslie Yauckoes seconded the motion. The motion was approved unanimously.

ARTICLE VII. To vote on the proposed Fiscal Year 2025 Capital Improvement projects and the Long Range Plan.

Treasurer Dave Kaffine explained that the long range plan is not voted on. The use of the capital improvement funds are used as needed. (There are multiple projects identified but one issue may need immediate attention.) There will be a fee for the inspection of the sprinkler system.

No vote was taken.

ARTICLE VIII. To vote on the delegates to the 2024 UUA General Assembly.

Joan Coyne and Diana Keohane volunteered to be delegates to the UUA General Assembly.

John Schneider made a motion and Diana Keohane seconded the motion. The motion was approved unanimously. There are two other delegate positions open and, as those volunteers were not known at the meeting, they will be approved by the Standing Committee at their next meeting.

ARTICLE IX. To open discussion to any other issues of concern to the members. No vote will be taken.

No one offered any issues for discussion.

ARTICLE X. To vote to adjourn the meeting.

Rosemary McMullin made a motion and Nancy Kaelin seconded the motion. The motion was approved unanimously.

Auditor's Report 2023 – 2024

Sandy Johnston, Andrew Worthen, and Susan Woodmansee served as auditors for the 2023-2024 fiscal church year. The audit committee's work followed the UUA's checklist of recommended audit questions and topics. We met together via Zoom.

The auditors met with the Treasurer David Kaffine, Bookkeeper Jeff Ellis, Board of Investment (BOI) Secretary Barry Jefferson, and Collector Carla Corey to review the financial records and practices of the church for the fiscal year July 1, 2023 through June 30, 2024. Reports, transactions and processes were reviewed, and a sampling of transactions were examined in detail as "spot checks" of compliance and accuracy. A combination of electronic and paper records were reviewed, including cross-checks to ensure consistency between the two.

First Parish enjoys a strong financial position and experienced staff and volunteers in these key financial roles. The auditors believe that the records and the reports for the Treasurer, the Collector, and the BOI accurately reflect the church's financial condition and activity for the period audited. During the course of the audit, a few discrepancies were found through independent review of the Society's financial records that are still being resolved. We expect that all issues and questions will be resolved through the course of closing out the audit in the coming weeks. Our activities highlight the benefit of having fresh eyes and perspective on a regular basis. In addition to this summary, recommendations will be provided to the Standing Committee.

The auditors would like to commend the stewards of our finances for their service, their dedication, and their care in maintaining our strong financial position. We appreciate the cooperation of Dave, Jeff, Carla, and Barry for providing their records and reports for review and answering our questions. On behalf of the congregation, we thank them for the integrity of their work. The financial condition of our society is a reflection of their efforts. First Parish is exceedingly fortunate to have the dedicated service of all these individuals.

Respectfully submitted,
Sandy Johnston, Andrew Worthen, Susan Woodmansee
10/1/2024

Treasurer's Report for FY24 - Ending June 30, 2024

FY24 marks the completion of the first year in my current term (my second!) as your Treasurer. I would like to thank the members of the Finance Committee for their assistance in overseeing and reviewing our church finances: Diana Keohane (most recent Treasurer), Nancy Kaelin, Chris Sweetnam, Neil Harmon (current Assistant Treasurer), Rebecca Gore, and Tom Coffey. Additional thanks to Russ Menk who was involved in finance meetings while serving as our Sabbatical Minister, and also to Jeff Ellis (Bookkeeper), and Carla Corey (Collector) for their work in keeping our financial records up to date.

A couple highlights from this past year include successfully transitioning our records to QuickBooks Online, and successfully funding Reverend Ellen's sabbatical.

The budget that the congregation passed for FY24 was intentionally not balanced – it had a \$10,500 deficit, with the expectation based on history that we would still end the year with a surplus. That was the case, and FY24 has ended with a surplus of just over \$19K. \$10K of that has already been targeted for the FY25 operating budget. The Standing Committee and congregation will vote in September on where to allocate the remaining \$9.2K, which is generally just placed into reserves.

The main contributors to the discrepancies between budgeted and actual finances were:

- Income was \$19K higher than budgeted, primarily due to generosity with pledges and donations being higher than budgeted
- Salary/personnel costs were \$6K lower than budgeted, a combination of not all hours being worked, professional expenses being underspent, and payroll taxes, pension costs, and workers compensation insurance being less than budgeted
- Operating expenses were \$3K lower than budgeted, with supplies and postage being under budget along with some of our contract services
- Committee expenses were about \$1.5K under budget

Thanks to everyone in the First Parish community for your generous financial contributions that have allowed us to end FY24 on a very positive note. More detailed FY24 financial information can be found in the reports on the following pages.

One item from the detailed reports is worth some additional clarification. While building expenses overall were right on target, the electric utility expenses were significantly over budget (\$4K budgeted, \$7K spent). This is due to increased building use over the last couple of years, along with a significant (22%) jump in the supply rate that most Chelmsford customers saw starting last November. Due to some complexities in our billing (we get a discounted rate by paying a separate solar provider and then getting rebates on our National Grid bills), this was difficult to track down, which is why our budgeting hasn't kept up with the electrical expenses (last year was also over budget, by \$2K). Since we did not catch this in time for the FY25 budget, that will likely also be \$3K over. The FY26 budget will be able to set a more accurate amount for the electric utility line item now that this is understood.

I am looking forward to serving as your Treasurer for another year (and more). If anyone ever has questions or concerns about the financial operations of First Parish, please don't hesitate to contact me.

Reports Attached

- June 30, 2024 - Balance Sheet (with 6/30/23 comparison)
- FY24 Income and Expense vs Budget – Summary Report
- FY24 Income and Expense vs Budget – Detail Report

Respectfully submitted,
Dave Kaffine, Treasurer

First Congregational Society, Unitarian Statement of Financial Position

As of June 30, 2024

	Total	
	As of Jun 30, 2024	As of Jun 30, 2023 (PP)
ASSETS		
Current Assets		
Bank Accounts		
1012 Enterprise Bank	38,826.48	36,234.94
1013 Enterprise - Min. Discretionary	9,525.29	4,712.86
1014 Enterprise - Debit Cards	1,904.20	944.45
1015 Fidelity Investments	210,387.35	241,697.06
Total Bank Accounts	\$ 260,643.32	\$ 283,589.31
Total Current Assets	\$ 260,643.32	\$ 283,589.31
TOTAL ASSETS	\$ 260,643.32	\$ 283,589.31
LIABILITIES AND EQUITY		
Liabilities		
Current Liabilities		
Other Current Liabilities		
2420 Community Table Fund	2,492.31	2,792.91
2430 SC Discretionary Fund	522.12	1,122.12
2760 Pledges Next Year	15,890.06	20,910.00
2780 Faith In Action Grants	2,821.14	3,750.00
2811 Ministers Discretionary Funds	9,525.29	4,712.86
Total Other Current Liabilities	\$ 31,250.92	\$ 33,287.89
Total Current Liabilities	\$ 31,250.92	\$ 33,287.89
Long-Term Liabilities		
2300 Reserve Funds		
2320 Service Programs Fund	4.71	10,749.63
2330 Facilities Reserves Fund	3,508.49	1,761.46
2340 Operating Reserves	110,942.02	102,469.97
Total 2300 Reserve Funds	\$ 114,455.22	\$ 114,981.06
2774 Capital Improvements Fund	-149.54	12,099.43
2776 Minister Sabbatical Fund	0.00	20,373.26
2777 Steeple Fund	51,396.00	49,396.00
2782A Service Trips - Johan Memorial	9,030.00	9,030.00
2784 Ministerial Intern Fund	1,000.00	1,200.00
2787 General Assembly Trip Fund	300.00	2,500.00
2788 All Church Retreat Fund	418.44	2,468.42
2792 Health Insurance Fund	7,767.90	6,000.00
2816 Hand Bells	1,088.50	938.50
2818 Organ repair and maint.	839.00	739.00
2880 Information Technology Fund	4,077.97	
2890 Building Equip and Repair	4,493.00	2,493.00
2891 Reserve Snow Removal	9,500.00	6,000.00
Total Long-Term Liabilities	\$ 204,216.49	\$ 228,218.67
Total Liabilities	\$ 235,467.41	\$ 261,506.56
Equity		
1016 Fidelity Unrealized Gain/Loss	5,947.88	-2,207.58
3010 Unrestrict (retained earnings)	0.00	24,290.33
Net Revenue	19,228.03	
Total Equity	\$ 25,175.91	\$ 22,082.75
TOTAL LIABILITIES AND EQUITY	\$ 260,643.32	\$ 283,589.31

First Congregational Society, Unitarian
Budget vs. Actuals: FY_2023_2024 - FY24 P&L
 July 2023 - June 2024

	Actual	Budget	Total over Budget	% of Budget
Revenue				
4000 Operating Income			0.00	
Total 4010 Collectors Deposit	\$ 288,324.51	\$ 267,185.00	\$ 21,139.51	107.91%
Total 4020 Fund Raising	\$ 11,659.50	\$ 15,000.00	-\$ 3,340.50	77.73%
Total 4030 Building Use	\$ 28,380.00	\$ 27,400.00	\$ 980.00	103.58%
4040 Investment Income	72,005.94	72,000.00	5.94	100.01%
4041 Cell Tower 2 tranfers to Operat	10,200.00	10,200.00	0.00	100.00%
4043 Prev Yr Surplus Carried Forward	16,000.00	16,000.00	0.00	100.00%
Total 4000 Operating Income	\$ 426,569.95	\$ 407,785.00	\$ 18,784.95	104.61%
4052 Return Check Fee	-60.00		-60.00	
Total Revenue	\$ 426,509.95	\$ 407,785.00	\$ 18,724.95	104.59%
Gross Profit	\$ 426,509.95	\$ 407,785.00	\$ 18,724.95	104.59%
Expenditures				
Total 7200 Salaries & related expenses	\$ 269,589.70	\$ 275,323.00	-\$ 5,733.30	97.92%
Total 7500 Other personnel expenses	\$ 2,813.98	\$ 3,200.00	-\$ 386.02	87.94%
Total 8100 Operating Expenses	\$ 36,663.87	\$ 40,051.00	-\$ 3,387.13	91.54%
Total 8200 Building Expenses	\$ 61,567.56	\$ 61,420.00	\$ 147.56	100.24%
Total 8300 OutReach	\$ 20,525.00	\$ 20,525.00	\$ 0.00	100.00%
Total 8500 Committees	\$ 15,121.81	\$ 16,732.00	-\$ 1,610.19	90.38%
Total 8600 Other Expenses	\$ 1,000.00	\$ 1,000.00	\$ 0.00	100.00%
Total Expenditures	\$ 407,281.92	\$ 418,251.00	-\$ 10,969.08	97.38%
Net Operating Revenue	\$ 19,228.03	-\$ 10,466.00	\$ 29,694.03	-183.72%
Net Revenue	\$ 19,228.03	-\$ 10,466.00	\$ 29,694.03	-183.72%

Thursday, Sep 05, 2024 07:20:18 AM GMT-7 - Cash Basis

First Congregational Society, Unitarian
Budget vs. Actuals: FY_2023_2024 - FY24 P&L
 July 2023 - June 2024

	Actual	Budget	Total over Budget	% of Budget
Revenue				
4000 Operating Income			0.00	
4010 Collectors Deposit			0.00	
4011 Prior Year Pledges	12,667.50	4,000.00	8,667.50	316.69%
4012 Current Year Pledges	265,966.35	257,385.00	8,581.35	103.33%
4013 Known Donors	4,415.00	2,000.00	2,415.00	220.75%
4014 Sanctuary Plate	5,447.64	4,000.00	1,447.64	136.19%
4015 Online Donation Fees	-171.98	-200.00	28.02	85.99%
Total 4010 Collectors Deposit	\$ 288,324.51	\$ 267,185.00	\$ 21,139.51	107.91%
4020 Fund Raising			0.00	
4023 July 4th Net		0.00	0.00	
4023A July 4th Income	2,075.00	2,000.00	75.00	103.75%
4023B July 4th Expense	-665.46	-500.00	-165.46	133.09%
Total 4023 July 4th Net	\$ 1,409.54	\$ 1,500.00	-\$ 90.46	93.97%
4025 Holiday Fair Net		1,500.00	-1,500.00	0.00%
4025A Holiday Fair Income	3,470.00		3,470.00	
4025B Holiday Fair Expense	-2,327.71		-2,327.71	
Total 4025 Holiday Fair Net	\$ 1,142.29	\$ 1,500.00	-\$ 357.71	76.15%
4027 Auction Net		11,000.00	-11,000.00	0.00%
4027A Auction Income	9,208.93		9,208.93	
4027B Auction Expense	-101.26		-101.26	
Total 4027 Auction Net	\$ 9,107.67	\$ 11,000.00	-\$ 1,892.33	82.80%
4029 Other Fundraising Net		1,000.00	-1,000.00	0.00%
Total 4020 Fund Raising	\$ 11,659.50	\$ 15,000.00	-\$ 3,340.50	77.73%
4030 Building Use			0.00	
4031 Alcoholics Anonymous	1,410.00	1,500.00	-90.00	94.00%
4032 Overeaters Anonymous	725.00		725.00	
4033 Room Rentals- Other	4,765.00	4,000.00	765.00	119.13%
4036 Nursery School	21,480.00	21,400.00	80.00	100.37%
4039 Weddings, Funerals		500.00	-500.00	0.00%
Total 4030 Building Use	\$ 28,380.00	\$ 27,400.00	\$ 980.00	103.58%
4040 Investment Income	72,005.94	72,000.00	5.94	100.01%
4041 Cell Tower 2 tranfers to Operat	10,200.00	10,200.00	0.00	100.00%
4043 Prev Yr Surplus Carried Forward	16,000.00	16,000.00	0.00	100.00%
Total 4000 Operating Income	\$ 426,569.95	\$ 407,785.00	\$ 18,784.95	104.61%
4052 Return Check Fee	-60.00		-60.00	
Total Revenue	\$ 426,509.95	\$ 407,785.00	\$ 18,724.95	104.59%
Gross Profit	\$ 426,509.95	\$ 407,785.00	\$ 18,724.95	104.59%
Expenditures				
7200 Salaries & related expenses			0.00	
7210 Minister TCM			0.00	
7211 Salary Minister	76,521.36	76,521.00	0.36	100.00%
7212 Housing	21,000.00	21,000.00	0.00	100.00%
7213 Fica Reimb	7,459.92	7,460.36	-0.44	99.99%
7214 Pension/Minister/Employer	9,752.28	9,752.10	0.18	100.00%
7216 LTD Insurance Minister	1,267.80	1,267.77	0.03	100.00%
7217 Life Insurance Minister	816.00	819.18	-3.18	99.61%
7229 Professional Allowance Minister	6,339.56	7,070.00	-730.44	89.67%
Total 7210 Minister TCM	\$ 123,156.92	\$ 123,890.41	-\$ 733.49	99.41%
7300 Director of Faith Formation			0.00	
7310 Salary Director of FF	57,195.14	57,194.50	0.64	100.00%
7311 Pension/DFF/Employer	6,260.52	5,719.45	541.07	109.46%
7315 Prof Allowance DFF	2,147.38	4,147.00	-1,999.62	51.78%

7316 LTD Insurance DFF	743.52	743.53	-0.01	100.00%
7317 Life Insurance DFF	480.48	480.43	0.05	100.01%
Total 7300 Director of Faith Formation	\$ 66,827.04	\$ 68,284.91	-\$ 1,457.87	97.87%
7320 Director of Music			0.00	
7322 Salary Director of Music	30,576.00	30,576.00	0.00	100.00%
7323 Pension/Music/Employer	2,293.20	3,057.60	-764.40	75.00%
7325 Prof Allowance Music Director	2,274.21	2,217.00	57.21	102.58%
7326 LTD Music Director	397.44	397.49	-0.05	99.99%
7327 Life Insurance Music Director	256.80	256.84	-0.04	99.98%
Total 7320 Director of Music	\$ 35,797.65	\$ 36,504.93	-\$ 707.28	98.06%
7335 Salary Office Assistant	14,361.60	17,259.14	-2,897.54	83.21%
7370 Faith Formation Assistant	7,160.00	7,161.18	-1.18	99.98%
7399 Derate actual employee hours		-1,000.00	1,000.00	0.00%
7400 Payroll taxes	7,786.49	8,506.10	-719.61	91.54%
7405 Health care reimbursement	14,500.00	16,500.00	-2,000.00	87.88%
7406 Derate Health Reimbursement		-2,000.00	2,000.00	0.00%
7600 Next Year Merit salary bucket		216.33	-216.33	0.00%
Total 7200 Salaries & related expenses	\$ 269,589.70	\$ 275,323.00	-\$ 5,733.30	97.92%
7500 Other personnel expenses			0.00	
7520 Staff Development	452.23	400.00	52.23	113.06%
7530 Staff Recognition	300.00	300.00	0.00	100.00%
7540 WC Insurance	2,061.75	2,500.00	-438.25	82.47%
Total 7500 Other personnel expenses	\$ 2,813.98	\$ 3,200.00	-\$ 386.02	87.94%
8100 Operating Expenses			0.00	
8110 Office Supplies	565.02	1,000.00	-434.98	56.50%
8120 Information Technology	3,688.00	3,760.00	-72.00	98.09%
8130 Telephone	2,110.26	2,156.00	-45.74	97.88%
8135 Cell Phones	1,704.63	1,566.00	138.63	108.85%
Total 8130 Telephone	\$ 3,814.89	\$ 3,722.00	\$ 92.89	102.50%
8140 Postage, shipping, delivery	437.92	1,000.00	-562.08	43.79%
8150 Printers and Copiers			0.00	
8151 Lease/Maintenance Contract	2,150.00	2,150.00	0.00	100.00%
8154 Printer and Copier supplies	342.00	350.00	-8.00	97.71%
Total 8150 Printers and Copiers	\$ 2,492.00	\$ 2,500.00	-\$ 8.00	99.68%
8160 Nursery Services	3,214.56	3,500.00	-285.44	91.84%
8170 Organ & Piano Service	1,810.00	2,650.00	-840.00	68.30%
8190 Payroll Service	2,825.98	3,160.00	-334.02	89.43%
8195 Contracted Bookkeeping Services	13,181.25	11,544.00	1,637.25	114.18%
8196 Contracted Business Manager	4,634.25	7,215.00	-2,580.75	64.23%
Total 8100 Operating Expenses	\$ 36,663.87	\$ 40,051.00	-\$ 3,387.13	91.54%
8200 Building Expenses			0.00	
8210 Fire Alarm Services			0.00	
8211 Alarm Annual Testing	426.00	500.00	-74.00	85.20%
8212 Alarm Monitoring	600.00	600.00	0.00	100.00%
8213 Alarm Repair		250.00	-250.00	0.00%
8214 Fire Extinguisher Inspect	230.75	350.00	-119.25	65.93%
8215 Sprinkler System Inspect	556.00	400.00	156.00	139.00%
Total 8210 Fire Alarm Services	\$ 1,812.75	\$ 2,100.00	-\$ 287.25	86.32%
8220 Elevator Services	6,420.50	7,690.00	-1,269.50	83.49%
8230 Equipment Purchase/Repair	2,000.00	2,000.00	0.00	100.00%
8235 A/V for Sanctuary	900.00	1,000.00	-100.00	90.00%
8240 Utilities			0.00	
8241 Utilities - Gas	5,438.19	5,500.00	-61.81	98.88%
8242 Utilities - Electric	7,000.67	4,000.00	3,000.67	175.02%
8243 Utilities - Water	701.82	850.00	-148.18	82.57%
8244 Utilities - Sewer	784.32	1,200.00	-415.68	65.36%
Total 8240 Utilities	\$ 13,925.00	\$ 11,550.00	\$ 2,375.00	120.56%
8250 Custodial Service and Supplies			0.00	
8251 Custodial Services	9,460.00	8,000.00	1,460.00	118.25%

8252 Custodial Supplies	1,373.00	700.00	673.00	196.14%
Total 8250 Custodial Service and Supplies	\$ 10,833.00	\$ 8,700.00	\$ 2,133.00	124.52%
8260 Maintenance Building			0.00	
8261 General Maintenance	3,642.77	3,340.00	302.77	109.06%
8262 HVAC Maintenance	950.00	1,920.00	-970.00	49.48%
8263 Kitchen Maintenance	250.00	1,000.00	-750.00	25.00%
Total 8260 Maintenance Building	\$ 4,842.77	\$ 6,260.00	-\$ 1,417.23	77.36%
8271 Snow Removal	8,910.04	9,000.00	-89.96	99.00%
8272 Trash Removal	1,955.50	2,420.00	-464.50	80.81%
8280 Insurance	9,968.00	10,700.00	-732.00	93.16%
Total 8200 Building Expenses	\$ 61,567.56	\$ 61,420.00	\$ 147.56	100.24%
8300 OutReach			0.00	
8310 UUA Contributions	20,525.00	20,525.00	0.00	100.00%
Total 8300 OutReach	\$ 20,525.00	\$ 20,525.00	\$ 0.00	100.00%
8500 Committees			0.00	
8501 Committee derating factor		-3,000.00	3,000.00	0.00%
8515 Archives		50.00	-50.00	0.00%
8521 Welcoming Congregation	918.00	1,940.00	-1,022.00	47.32%
8525 Canvass		100.00	-100.00	0.00%
8530 Caring Connections	68.00	200.00	-132.00	34.00%
8535 Flowers		300.00	-300.00	0.00%
8538 Green Ministry		200.00	-200.00	0.00%
8540 Grounds	215.66	800.00	-584.34	26.96%
8545 House Management		150.00	-150.00	0.00%
8555 Membership	536.55	650.00	-113.45	82.55%
8557 Ministry		50.00	-50.00	0.00%
8560 Music	3,202.42	3,732.00	-529.58	85.81%
8570 Parish Affairs	130.64	760.00	-629.36	17.19%
8572 Pastoral Care	132.00		132.00	
8575 Publicity	312.00	275.00	37.00	113.45%
8580 Lifespan Faith Formation	7,305.98	7,150.00	155.98	102.18%
8585 Social Action	516.61	1,075.00	-558.39	48.06%
8590 Standing Committee	323.95	400.00	-76.05	80.99%
8599 Worship	1,460.00	1,900.00	-440.00	76.84%
Total 8500 Committees	\$ 15,121.81	\$ 16,732.00	-\$ 1,610.19	90.38%
8600 Other Expenses			0.00	
8630 Sabbatical	1,000.00	1,000.00	0.00	100.00%
Total 8600 Other Expenses	\$ 1,000.00	\$ 1,000.00	\$ 0.00	100.00%
Total Expenditures	\$ 407,281.92	\$ 418,251.00	-\$ 10,969.08	97.38%
Net Operating Revenue	\$ 19,228.03	-\$ 10,466.00	\$ 29,694.03	-183.72%
Net Revenue	\$ 19,228.03	-\$ 10,466.00	\$ 29,694.03	-183.72%

Thursday, Sep 05, 2024 07:20:18 AM GMT-7 - Cash Basis

FY24 Surplus Distribution Proposal / FY25 Budget Amendment

FY24 ended with a surplus of \$19,222. The congregation previously voted to use \$10,000 of the projected surplus for the FY25 operating budget.

Rather than putting all of the remaining FY24 surplus into reserves, the Standing Committee proposes distributing the remainder of the FY24 surplus as follows:

Item	Amount	Notes
4043 Prev Yr Surplus	\$ 10,000	Previously approved for FY25 budget
4043 Prev Yr Surplus	\$ 2,000	Additional amount to fund an increase for Lifespan Faith Formation assistant hours (from 8hr/wk to 10hr/wk)
2787 General Assembly Trip Fund	\$ 2,000	Current balance is down to \$300
2340 Operating Reserves	\$ 5,228	Current balance is \$111K
Total	\$ 19,228	

Approving this proposal would:

- Move funds as indicated into *2787 General Assembly Trip Fund* and *2340 Operating Reserves*
- Amend the FY25 budget as follows:
 - o Increase *4043 Prev Yr Surplus* income by \$2,000
 - o Increase *7370 Faith Formation Assistant* expense by \$2,000 (from \$7,161 to \$9,161)
 - o Since income/expense changes are balanced, Net Revenue is unchanged (a projected \$10,600 deficit which based on history will still result in a surplus)

Collector's Report 2023 – 2024

Please find below a record of all deposits processed through the Collector for FY2024. As always I am appreciative of the help received from Office Staff – namely Erica Clifford and Jeff Ellis – and from our Treasurer, Dave Kaffine.

Once again I feel it is important to lift up the continued generosity of our First Parish community. Thank you for that and for the trust you have placed in me allowing me to serve the Congregation in this capacity.

Respectfully submitted,
Carla Corey, Collector

<u>Account Name</u>	<u>Total</u>
2022-2023 Pledge	12,667.50
2023-2024 Pledge	251,482.35
2024-2025 Pledge	17,865.06
Known Donor	4,490.00
Loose Collection	5,443.14
Share-the-Plate	1,386.73
Minister's Discretionary Fund	600.00
Total	<u>\$293,934.78</u>

Board of Investments FY 2024 Annual Report

The Board of Investments is tasked with overseeing the investment of the Society's endowment funds, keeping an accurate accounting of said funds, and recommending a sum to be used in defraying the annual operating budget. The Treasurer is an ex-officio member of the Board of Investment.

The Board suggested at the beginning of this calendar year, that the church FY 2025 income from investments for the next fiscal year be an amount equal to 4% of a rolling average of the portfolio balance for the last 13 calendar quarters prior to December 31st, or \$74,000.

This year we continued a refinement in our investment strategy. To support the goal of providing maximum portfolio balance in a turbulent market, we rebalanced our 7823 Burbank Wealth account by trading a portion of our American Funds for Exchange Traded Funds (ETFs). This trade brought the account into a better balance of small- and mid-cap equities, with 59.8% being in the American Mutual Funds, 38.8% in ETFs, and 1.4% in cash. This account, which supports the church's operating budget through both income and equity sales, contains approximately 63% of our Burbank Wealth holdings.

The 3810 FundSource Account, used previously for church renovation collateral, now helps support the church's operating budget through its income. Invested in the Wells Fargo Moderate Growth & Income Optimal Blend-V3, which is a managed package of 20 diverse funds, the FundSource account represents approximately 27% of our Burbank Wealth holdings.

The 1396 Wells Fargo ESG socially responsible fund is a managed package of 11 mutual funds and 3 Stock ETF funds that contains the remaining 10% of our Burbank Wealth holdings.

About 4% of our total assets are invested in the Carlene Merrill Human Resources UUCEF fund managed by the UUA. This is a socially responsible fund that uses twenty-four outside advisors and managers to implement an active program of Socially Responsible Investing (SRI).

The three Burbank Wealth accounts hold 100% of our unrestricted funds and 34% of our restricted funds. The Carlene Merrill UUA/UUCEF account holds the remaining 66% of our restricted funds. Per the year-end rollup spreadsheet, a Restricted Fund is one that, by formal agreement with the donor, can only be used for its designated purpose, whereas an Unrestricted fund can be used per the discretion of church management. Our unrestricted funds received over \$25,000 of donations this year.

Like last year, this year has continued to be a financially healthy one, with 14.41% return from our Burbank American Fund and ETF account, 8.93% from our Burbank FundSource account, 9.69% from our Burbank ESG socially responsible account, and 9.17% from our UUCEF Carlene Merrill HR Fund. Collectively, they have given a 12.30% return to our total portfolio. After receiving over \$28,000 in donations and withdrawing approximately \$72,000 for church operations, our total portfolio holdings have increased \$184,515 from \$1,855,123 to \$2,039,638.

This year the committee extends its thanks to Leslie Small for her excellent years of service and welcomes Ramon Cervantes as a new member.

The Board meets on the 4th Monday of January, April, July, and October, with additional meetings as required. All meetings are open to members of the parish.

Nancy Kaelin, Chairman
Barry Jefferson, Financial Officer
Ramon Cervantes, Financial Reviewer
Warren Flewellen, Secretary
Dave Kaffine, Treasurer

Our Endowment Funds designated "Miscellaneous Bequests for General Use" were given by or in honor of the following people:

Deacon Otis Adams	1876	300.00	Harold J. Davis	1997-8	127350.00
Ephraim Parkhurst	1879	450.00	Robert Kuehn	1998	10500.00
Donations	1883	200.00	Glenn & Phyllis King	1999	100.00
O. Emerson	1885	316.67	C. Richmond Page	2000	5000.00
Martha P. Dickson	1889	12.00	Charles Ruiter	2000	1215.00
Joseph Warren	1890	1000.00	Carl McKittrick	2000	1440.00
Henrietta Richardson	1896	100.00	Charlotte DeWolf	2000	480.00
Benjamin Fiske	1901	1000.00	Julia Fogg	2000	295.84
Jeremiah J. Shedd	1902	200.00	Dorothy Cook	2000	1050.00
Sarah P. Emerson	1903	100.00	Alan Kent	2000	977.49
A. Howard Richardson	1904	150.00	Madelon Clough	2003	10000.00
Jos. & Benj. Fiske	1905	1500.00	Beth & Carole	2004	685.00
Emily Reid	1910	100.00	Robert Russell	2004-5	2345.00
M.C. Reed	1911	100.00	Hazel Fiske	2004	375.00
Silina G. Richardson	1915	200.00	Roman Muniichiello	2005	250.00
Church members	1913	135.15	Maxine McKittrick	2005	635.00
Cora A.G. Flint	1922	3000.00	Reid & Anna Johnston	2005	500.00
Mary E. Richardson	1926	100.00	Eleanor Butterfield	2006	10824.60
Celia A. Richardson	1926	100.00	Joan Russell	2008	550.00
Martha Warren	1939	110.41	Wilson Family	2008	200.00
Anna Searle	1941	200.00	David Johnston	2008	500.00
F.A.P. Fiske	1943	3000.00	Jane Drury	2009-10	1945.00
Albert H. Davis	1944	300.00	Shirley Martino	2010	285.00
Frank Emerson	1957	6726.50	Madelon Clough	2010	125.00
Parker Fund	1957	409.40	Roy Mellen	2010	565.00
Edith Perham	1958	1000.00	Barbara Parkhurst	2011	410.00
Edith W. Emerson	1958	1000.00	Geoffrey Jody	2011	375.00
Unitarian Players	1963	500.00	Dennis Doughty	2013	2500.00
Misc. Mem. Fnds	1964	115.00	John E. Anastos	2013	150.00
Anonymous	1971	348.50	Barbara Crouch	2013	300.00
Ethel C. Bartlett	1973	1000.00	Cynthia Watson	2017	61811.30
Levi Howard	1975	1000.00	Thomas Wight	2019	2175.00
William T. Shafer	1986	1000.00	Audrey Wilson	2019	300.00
Barbara Jones	1989	1000.00	Larry Pelosi	2019	100.00
Wallace Greig	1990	1000.00	Carole Russell	2022	6500.00
Robert Clough	1994	2000.00	Elizabeth George Traggis	2022	50.00
Ralph Cole	1994-6	10075.00	Barbara Jones	2023	10000.00
Edwin Jewett	1995-6	175.00	Ministry of Ellen Rowse Spero	2024	25000.00
Jollene Dubner	1995-6	870.00	Joan Kennedy	2024	205.00
Harold J. Davis	1997-8	127350.00	Mickey O'Connor	2024	600.00
Jollene Dubner	1995-6	870.00	Sue Sheedy	2024	1825.00

Our Endowment Funds designated "Carlene Merrill HR Fund" were given by or in honor of the following people:

Carlene Merrill	2022-3	70350.00
Ellen Ford	2023	75.00

Report of the Board of Investments

July 1, 2023 - June 30, 2024

Rev 02 2024-08-02 Final B. Jefferson
 Corrections per comments from R. Cervantes

Summary of Holdings

Burbank Managed American Mutual and ETF Funds (Account 7823)

Purpose: holdings that support general operating expenses and include a combination of restricted and unrestricted funds

Value 6/30/23	FY24 Withdrawals	FY24 Deposits	Value 6/30/24	Management Fees	Total Return	Percent Return	Percent of Portfolio
1,112,536.07	64,776.13	18,198.48	1,226,262.27	8,582.82	160,303.85	14.41%	60.12%
Name	Type	Value 6/30/23	Value 6/30/24	Percent of General Fund			
Cash Account	Money Market	15,770.72	17,648.84	1.44%			
Bond Fund of America	Mutual Fund	81,408.91	79,621.89	6.49%			
Europacific Growth Fund	Mutual Fund	54,591.60	57,180.00	4.66%			
Growth Fund of America	Mutual Fund	166,619.07	210,196.40	17.14%			
Income Fund of America	Mutual Fund	115,908.70	121,946.27	9.94%			
Washington Mutual Investors Fund	Mutual Fund	226,304.35	264,064.25	21.53%			
IShares Core Emerg Mkts	ETF	55,352.67	59,793.01	4.88%			
IShares Russel Mid-Cap	ETF	56,018.40	60,249.26	4.91%			
IShares Core U.S. Aggreg. Bond	ETF	60,826.95	59,503.91	4.85%			
Vanguard Short Term	ETF	20,479.47	20,478.90	1.67%			
Vanguard Long Term Corp Bond	ETF	61,850.12	59,701.82	4.87%			
Vanguard Small Cap	ETF	100,563.20	108,781.92	8.87%			
Vanguard High Dividend Index	ETF	96,841.91	107,095.80	8.73%			
				Total:		100.00%	

Burbank Managed Fundsource Account (Account 3810)

Purpose: holdings originally established for church renovation project and whose earnings currently support church operating expenses

Value 6/30/23	FY24 Withdrawals	FY24 Deposits	Value 6/30/24	Management Fees	Total Return	Percent Return	Percent of Portfolio
493,814.90	7,229.81	7,205.00	537,888.47	5,005.29	44,098.38	8.93%	26.37%

Burbank Managed ESG Account (Account 1396)

Purpose: holdings of socially responsible equities that are held in reserve but not currently used to support church finances

Value 6/30/23	FY24 Withdrawals	FY24 Deposits	Value 6/30/24	Management Fees	Total Return	Percent Return	Percent of Portfolio
175,745.32	0.00	3,000.00	195,767.30	1,820.90	17,021.98	9.69%	9.60%

UUA/UUCEF Managed Carlene Merrill HR Fund

Purpose: Established by the estate of Carlene Merrill upon her passing, this restricted fund is designated to support Human Resources

Value 6/30/23	FY24 Withdrawals	FY24 Deposits	Value 6/30/24	Management Fees	Total Return	Percent Return	Percent of Portfolio
73,026.64	0.00	0.00	79,720.10	201.66	6,693.46	9.17%	3.91%

Totals:	1,855,122.93	72,005.94	28,403.48	2,039,638.14	15,610.67	228,117.67	12.30%	100.00%
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Summary of Funds

Note: the meaning of a Fund in this context is a pool of money donated by someone to honor individuals and/or provide for specific needs of the church.
 A Restricted Fund is one that, by formal agreement with the donor, can only be used for its designated purpose. An Unrestricted Fund can be used per the discretion of church management.
 With the exception of the Carlene Merrill HR Fund, funds are not held in separate accounts or equities apart from other investments. The existence of such funds, along with donations, withdrawals, and remaining balances, are tracked only on this spreadsheet. Currently, all non-Carlene Merrill funds are considered to reside in the Burbank American and ETF account.

Unrestricted Funds

Fund Name	Purpose	Value 6/30/23	FY24 Donations	FY24 Withdrawals	Value 6/30/24
Parsonage	General	0.00			0.00
McFarlin Fund	General	154,150.45		9,000.00	145,150.45
General Fund	General	1,582,603.45	27,630.00	63,005.94	1,773,425.20
Totals:		1,736,753.90	27,630.00	72,005.94	1,918,575.65

Restricted Funds

Fund Name	Purpose	Value 6/30/23	FY24 Donations	FY24 Withdrawals	Value 6/30/24
Elizabeth Fiske Graham	Capital Expenditures	0.00			0.00
G.A. & B.H. Parkhurst	Repairs to Building	8,944.32		2,000.00	6,944.32
Helen Fiske	Choir Music	0.00			0.00
Flower Funds	Church & Grounds	0.00			0.00
Joan Kennedy	Music Program	185.00			185.00
Charity Funds	Needy Families	36,213.07		2,000.00	34,213.07
Carlene Merrill HR Fund	Human Resources	73,026.64			79,720.10
Totals:		118,369.03	0.00	4,000.00	121,062.49

Fund History

The General Fund includes Miscellaneous Bequests.

All dividends, interest, and capital gains are added to the General Fund except for the Carlene Merrill HR Fund

Flower Funds made up of:

	Init. Value	Year Establ.
Eustace Fiske Memorial Fund	\$325.00	1984
Bette Davis Memorial Fund	\$360.00	1991
Barbara A. Parkhurst Fund	\$500.00	1997
Helen Page Fund	\$5,000.00	2008

Charity Funds made up of:

	Init. Value	Year Establ.
Ethel P. Parker Fund	\$2,000.00	1962
William D. Phelps Fund	\$672.00	1967
Spaulding Memorial Fund	\$1,000.00	1945
First Grace Charity Funds	\$12,530.00	1995

Other restricted funds which were merged into the General Fund in 2004:

	Init. Value	Year Establ.	Purpose
Mabel P. Warren	\$500.00	1931	Grounds
Arthur H. Warren	\$200.00	1931	Music
Gregory Center	\$235.00	1973	Youth Work

Parish Minister Annual Report For 2023-2024

My major focus of the past year was preparing for the four-month sabbatical that ran from February 5th through May 26th. The first part of the year, I worked with the sabbatical committee (Gail Burati, Joan Coyne, Cindy Gist, Liz Peterson, Bonnie Rankin and Ruth Whalen, with Dave Kaffine serving as the SC liaison) to plan for coverage. We reached out to our former intern, the Rev. Russ Menk, who agreed to serve as our part-time sabbatical minister. Brian Snow, a certified chaplain, agreed to oversee the pastoral care and work with the Pastoral Care and Service Team. Dolores stepped in as supervisor of staff. The newly reconstituted Worship Committee and I worked to plan leaders for the 16 Sundays I would be away, finding a balance between Rev. Russ, lay leaders from First Parish and outside leaders, Rev. Kathy Schmitz (a former member of First Parish), Dr. Genny Beemyn and Matt Meyers.

Also, in anticipation of the sabbatical, I worked with John Schneider to launch the Spirit of Life project, requesting that the congregation use the sabbatical time to reflect on where we are and where we need to go as the worst of the COVID pandemic recedes. Things have changed a great deal, within and beyond our congregation. How do we live into our covenant in these changing times? What do we need to let go of? What do we need to do differently? How do we understand our purpose and mission? I look forward to hearing more about what the Spirit of Life Team learned through their congregational conversations and survey.

Upon my return, I wrote a sabbatical report for the Standing Committee. Here is an excerpt:

My first question for all of us as I return is "what did we learn?". The sabbatical provided an opportunity for us to step away from doing things the way we have always done them and ask some big picture questions as we face a changed and changing world. As I said in my return sermon, the sabbatical time offered spaciousness: room to imagine new ways of doing things and to let go of what is no longer serving our congregational life.

I learned a couple of important things about myself. First, that I love being your minister and hold your trust in sacred care. I felt joyful being back in the pulpit last Sunday and seeing everyone, catching up on what happened while I was away, seeing familiar and new faces. It felt good.

Second, I came to realize the true impact of the COVID pandemic on me and my ministry as well as our community. During the shutdown and even as people came back, I felt responsible for ensuring that our congregation survived the pandemic—not just individual members but the institution itself. As we are all aware, COVID changed a lot of things, and we cannot go back to the way things were before. There were losses. We lost momentum, in terms of returning to our newly renovated building and imagining what was next. We lost people, as coming to church in person fell out of habit and individuals and families pulled away or left completely. We lost institutional structure and knowledge as committees shrunk or disappeared altogether. During the three plus years of the pandemic, I felt like I had to ensure those who returned had every desire or need met so they would stay. I felt like I had to plug all the structural holes and make sure that everything kept going smoothly. I recognize that I was not alone. Dolores was a wonderful partner during COVID, as were the SC chairs who saw us through: Brenda Rogers, Gail Burati, Joan Coyne (who served two terms), and Neil Harmon. Other lay leaders stepped up, including the other Standing Committee members, the new worship tech team and the reimagined Pastoral Care and Service team, to meet the demands of a virtual and then hybrid congregational community. But I did feel that the responsibility was mine, as I was the one most aware of what was happening day to day.

Third, the spaciousness of sabbatical gave me time to recognize my changing personal limitations and commitments. I had shared a couple of years ago with the Standing Committee at the time that during the pandemic, I was diagnosed with myalgic encephalomyelitis/chronic fatigue syndrome (ME/CFS). While the diagnosis was new, the symptoms are something I have been dealing with for almost four decades. It was a

matter of the medical community catching up. I am lucky that my ME/CFS is relatively mild and manageable: I do not suffer from some of the more debilitating symptoms that many do. But as I grow older, the symptoms I do struggle with, including profound fatigue after a long or stressful day, brain fogginess, and dizziness, are increasing in their severity if I am not careful in how I manage my energy. I had hoped that the four-month sabbatical would make a noticeable improvement in these symptoms, but unfortunately, that was not the case. Going forward, I need to be mindful of how I care for my health and well-being.

I am blessed to be returning to our congregation in a time of strength, health, and energy. The Spirit of Life project sounds as if it has engaged members in important conversations. The Pastoral Care and Service Team feels empowered in their ministry and has some good ideas about how they want to grow. We now have a strong Worship Committee, something that had disappeared during COVID, and I have a group of people with whom I can share worship planning and leading. I see several new faces in our pews, and I understand that we have some new members who signed the book while I was away. Our staff team did a great job in my absence and our new staff members seem more confident in their roles, as they make them their own. Dolores continues to be my partner in the professional ministries of the congregation, as she has taken on the role of lifespan faith formation and spiritual growth.

Over the coming weeks and months, I hope to talk with you and other key leaders and groups in the congregation about how we move forward together in the ministry and ministries of First Parish. I need to let go of my pattern of trying to fix everything for everyone and instead ask good questions to help us find our way through whatever is not working, causing disagreements or keeping us stuck. I want to support the energy

and enthusiasm I am witnessing in the Pastoral Care and Worship teams. And as I look to next year, I want to focus my time and energy on my essential functions as your called minister: worship, pastoral care, congregational leadership, especially in partnership with the Standing Committee, and leadership of the staff.

Here are some notes and highlights of my ministry over the year.

Worship: Until my sabbatical, I led most of the regular worship services in partnership with Christopher and for intergenerational services, with Dolores. We held our usual special services, including our Water and Flower Communion, Christmas Eve Candlelighting services, and Pancakes and Carols (in the vestry). This year's Pancakes and Carols included a pre-recorded "Three ministers walk into a deli..." service that I did with Rev. Carolyn Patierno and Rev. Elea Kemler. Rev. Russ covered the Tenebrae and Easter services in my absence. Dolores, Christopher and I also led three evening Advent services in December.

In addition, Joan Coyne and Caroline Snow led a service on the UUA's proposed changes to Article 2 (our UUA covenant) in October; Coach Justice Williams joined me in leading worship for MLK Sunday, sharing his experiences as a black trans person; and Rev. Liz Walker led worship with me on January 21st, to share about the "Can We Talk" Trauma Ministry program which we are working to replicate in Lowell, with the New Bethel AME Church.

Special Ceremonies and Rites of Passage:

- August 6, 2023: Wedding Service for Mark and Nora Tervo at First Parish
- August 19, 2023: Wedding Service for Ted Markee and Kathleen Ballerini at a friend's home in Chelmsford
- November 4, 2023: Memorial Service for Maxwell Carnathan, Blake Funeral Home
- January 13, 2024: Memorial Service for Sue Sheedy, First Parish
- February 2, 2024: Memorial Service for Maureen (Mickey) O'Connor, Blake Funeral Home
- June 9, 2024: Service of Child Dedication: Eviana Salowsky, child of Amanda and Tom Salowsky

Church Committee Meetings: I regularly attended meetings of the Standing Committee, Human Resources Subcommittee, the Committee on Ministry, the Worship Committee and the Pastoral Care and Service Team. I also held several meetings with the Sabbatical Committee. I attended the New England Regional UUA joint board retreat in September with the Standing Committee. I also met with John Schneider to brainstorm the “Spirit of Life” team goals and purpose.

Staff: The staff met weekly from September through June. I also met weekly one on one with Christopher Grills. I met with Jeff Ellis, Erica Clifford and Dolores Heredia-wood as needed. In August, the staff met for a retreat with Larry Peers to help us

evaluate our first year together, articulate our commitments as a staff to one and the congregation and share our expectations/requests from one another. We agreed that in addition to weekly staff meetings, we would schedule quarterly “big picture” check-in’s for November and January. Those were helpful in preparing for the sabbatical.

Dolores assumed my responsibilities as supervisor of staff while I was on sabbatical.

Faith Formation: Dolores and I led an in-person Women’s Christmas again this year and had over thirty participants! I met with the two Men’s small groups and with the Young Adult Group.

I would like to acknowledge the tremendous work that Dolores is doing to grow our lifespan faith formation programming, connecting and reconnecting people and families to First Parish through a variety of small group activities. Lifespan faith formation means just that—across all ages. Over the last year, in addition to running the Sunday morning programs for our children, she supported monthly small groups for adults, supported the Young Adult group; supported the Membership and Green Committees; worked with me and Christopher to plan our intergenerational worship services; organized, set up and cleaned up monthly evening potluck services for all ages; and supported parishioners who want to offer opportunities like the monthly music jam sessions. She supported the “Cook, Eat and Chats” January through May, co-facilitated the New UU Program, and supported the emergence of two new groups: the Sacred Spirituality Circle and one for folks in their 60’s, 70’s and 80’s. Please read her report for greater detail.

Pastoral Work: I am grateful to the Pastoral Care and Service Team: Liz Peterson, Brian Snow, Kathy Deschenes, Linda Newhard, Maura Snow, Sandy Johnston, Frans Janssen Cheryl Wilson, and Erin Clifford. I also thank all the knitters and crocheters and blessers who have made our prayer shawl ministry a gift of comfort to so many within and beyond our congregation.

Sandy Johnston and Linda Newhard kept folks connected with cards. Kathy Deschenes and Erin Clifford led Healing Conversations twice a month online. Diane Morris oversaw the outreach for rides and meals until she left the committee in the Spring. Maura Snow held regular “Zoom Cafés” to help keep folks connected and the whole team made sure to set up a table at social hour for parishioners to send cards to those in need of a kind word.

I led a pastoral care team training in September.

Brian Snow did a great job supporting the team during my sabbatical.

Social Outreach and Public Witness: I continued to participate in “Can We Talk” at the New Bethel AME Church in Lowell as we welcomed working with their new pastor, Rev. Sharel Roberson. I brought in Rev. Liz Walker to talk about the program

in a worship service. I attended a refresher training for “Can We Talk” as well. I recorded names for our Welcoming Congregation’s Transgender Day of Remembrance Service in November. I brought in Coach Justice Williams, a trans person of color and fitness coach to lead a service, followed by a group discussion of his book, “Deconstructing the Fitness Industrial Complex.”

Denominational and Interfaith Connections: I regularly attended the twice monthly meetings of the Chelmsford Clergy Group and met periodically with UU colleagues. I am again mentoring a student minister at the request of the UUMA.

Professional Development: I continued my monthly clergy coaching work with Larry Peers. I attended a ten-session course entitled “Entering the Healing Ground” which focused on grief tending, led by Frances Weller. I attended a reunion retreat with my Center for Courage and Renewal group in Sewanee, TN. I submitted and had accepted two pieces by Geez, a magazine focused on “contemplative cultural resistance”.

I would like to acknowledge the dedication and hard work of all our lay-leaders, in public and behind-the-scenes. I thank Neil Harmon for serving as chair of the Standing Committee in a sabbatical year. I would like to express special appreciation to those stepping down from elected leadership, including Standing Committee members Neil Harmon, Andrew Worthen and Jeanette Moreau; Nominating Committee members Laura Nutter, Joan Coyne and Caroline Snow; Board of Investment member Leslie Small. I would like to thank Carla Corey for serving as our collector. I would like to thank Garland Kemper and Stephanie Owen for leading a successful and energetic canvass pledge drive. And I would like to thank those who led our other fundraisers, including the Donut Sales and the Auction.

I will close as I always do: I am grateful on an almost daily basis for the privilege of serving as minister of this congregation. You are caring, committed, open, generous, hospitable, and gracious, to name just a few of your wonderful qualities. I love that you share your lives, your gifts, your stories, your families and your trust with me and with one another, embodying our covenants. The gifts of time, of talent, and of treasure you each share give this congregation its vitality, its joyfulness, its sense of purpose and commitment, and give life and expression to our shared Unitarian Universalist faith. I take great joy in our walk together, bearing witness to our faith through offering our sanctuary, our service and our worship. We continue to live in a time of deep divisions and fear in our country and I fear that it will only get harder as another election cycle approaches. We are in a liminal season when the old way of doing things has ended but we do not yet know what the new ways will be. But I trust that as we come together to discern faithfully how to live in the world, we will find our way through. You give me hope and courage.

In faith,
The Reverend Ellen Rowse Spero

Annual Report of the Lifespan Faith Formation Director, 2023-2024

The year's theme was Nurture, Nourish and Nature.

This year we focused on nurturing our roots-our beliefs & values, why we are, nourishing the trunk, supporting congregational life, who we are, loving nature and hoping it will respond with sweet fruits for all in the future. Lifespan Faith Formation nourishes our Unitarian Universalist Faith. It connects us from childhood to old age, to better understand how & why & what & whom and where? These connections are vital and achieved through collaboration with as many areas of the congregation as possible. Its intrinsic value is to strengthen, to nourish, to communicate, to support, to serve, to treasure, to flourish ~ through worship, prayer and offering essential tools to tackle life's mysterious joys & sorrows and mysterious knots.

I want to express my gratitude to everyone at First Parish, individual, families and congregational life, including staff for offering opportunities to the Lifespan Faith Formation program to flourish. It was a busy and exciting year that offered many opportunities throughout the program and congregational life to assess and honor what we have, and envision a wonder-full future. As new societal norms emerge the reason for our theme became self-evident. The reality of new religious trends showing lower participation nationally and worldwide forces us to adjust and adapt. Despite not having the same stream of volunteers and no "REFF" Assistant or limited nursery caregivers, the program did thrive. The Adult programs thrived as we tried many new ideas in order to see which would serve our community best. The youth program remained small, but strong-with very dedicated families. The absence of the High School Youth Group remains disheartening. The High School Youth who lost peer continuity and momentum because of the pandemic are especially affected. This was dispiriting because so much effort was placed for the growth and success prior to the pandemic.

Yet, gratefully, the younger youth will grow, and the many young wonderful families with babies will provide for a bright future. They/we/us found a place where mind, body and spirit have been nurtured, nourished through our First Parish and Unitarian Universalist nature.

I am so grateful to have been part of this wonderful congregation another year. Thank you!

Respectfully Submitted,

Gratefully,

Dolores GHeredia-Wood

Lifespan Faith Formation Director; dre@uuchelmsford.org

This report has the following sections:

1. Lifespan Faith Formation Programming
 - a. Lifespan Faith Formation & Membership-Hospitality Committee
 - b. First Parish Green Committee
2. Worship and Chapel
3. Sunday "RE" Faith Formation Programs
4. Lifespan Faith Formation/"RE"FF Council
5. Administrative/Committees

1. Lifespan Faith Formation Programming

Lifespan Faith Formation encompasses many areas in order to coordinate and collaborate as part of Faith Formation.

Small Group Ministry:

FPCC Small Groups offer the gift of connection with others and YoUU. I was asked to oversee per

Carlene Merrill request and Rev. Ellen's approval. Goal for SGM to maintain open door policy for new attendee's as Small Groups with variety of interests.

- Follow up of established SGM:
 - Ann Marie Sigdestad SGM continues.
 - Tom Coffey; 2 small groups; Men's Connection SGM. And Elder Men
- Small Groups
 - Soul Matters Small Group: Co-facilitating with Christina Cervantes.
 - UU Family Jam Band, led by Brian Snow
 - Soul Matters Collage Group, facilitated by Dolores~ Oct 27
- New Small Groups
 - Sacred Circle, Co-led Wendy Gillespie and Amanda Salowsky
 - 70's, 80's, Beyond and Retirees; Co-led, LFFD Oversee
- Additional Gatherings/Events:
 - Rev. Ellen in Women's Epiphany gathering on January 6th; 30+Participants
 - Coordinated/Facilitated monthly Cook, Eat, UU Chat gathering January to May
 - "Everyone" Evening (Evensong) Dinner/Potluck Services: First Sundays Monthly
- Coordinated/Facilitated monthly Cook, Eat, UU Chat gathering February through June; 6-20 Participants.

Young Adults:

- Coordinated Monthly in-person meetings; 3 to 9 participants, and not always the same attendees.
 - Observation of Young Adults including "new" young adults integrated in all other areas of the church/committees, which is one of the basic intentions of this group.

1a. Lifespan Faith Formation & Membership-Hospitality Committee

Membership-Hospitality Committee: Co-lead by: Carla Corey; Chris Sweetnam; Elaine Mahoney; Frans Janssen; Leslie Yackoes; Rose Lerer, FPCC Clerk, Dolores~ LFFD (oversee committee on their behalf).

- NEW UU Course/Retreat: Organized and co-facilitated with Rose Lerer. Six participants: Gwen Meins; Elaine Mahoney; Amanda MacLean; Hollie Kaduboski Wendy Gillespie; Marilyn Zwiercan
- Membership Recognition Service May 5th,
Recognition of Member Years:
New Members: Elaine Mahoney; Susan Tripathy; Amanda Maclean
Five: Leslie Small; Molly and Tip Rawding; Leslie Koresky; Michelle Boissonneault
Ten: Neil Harmon and Robyn Long-Navas
Twenty-Five + (ref. pandemic): Mary Gaynor; Frances Killam; Rose Lerer Dorrit Lammers; Deb Grad; Yoko Sano
- LFFD, oversee committee on their behalf, meetings and kept records in Google Doc format in conjunction with Breeze database, posting announcements on church entrance monitor and weekly, monthly media. Co-led and coordinated New UU. Also coordinated/co-lead Membership Recognition Service due to sabbatical. All administrative including submitting budget; communication forms and contacting
- Greeters/Breeze Sign Ups. LFFD coordinated greeters/sign-up; Bonnie Rankin; Ami Hughes; Rick Warner; Nancy Kaelin; Caroline Snow; Rose Lerer were the greeters throughout the year.

1b. First Parish Green Committee

- Reinstated Committee at beginning of year. Co-lead Committee: Christina Cervantes; Diana Keohane; Rebecca Gore; Nancy Kaelin, Amanda Maclean (YA); Lara Fredrick (YA)
- Initial Goal: FPCC in Climate Change Issues, the committee is exploring options of committing to UUA Green Sanctuary 2030 & First Parish Members involvement. Application Submitted
- LFFD, oversee committee on their behalf, meetings and kept records in Google Doc format in conjunction with Breeze database, posting announcements on church entrance monitor and weekly, monthly media. Also coordinated/co-lead Earth Day Service and Earth Day Fair. All administrative including submitting budget; communication forms and contacting

2. Worship and Chapel

- Worship Services: Collaboration with Rev. Ellen Spero-Rowse, Dr. Grills, Music Director, and Committees on monthly Intergen Services. Including For All Ages Storytelling and Embodied Worship. E.g.: Thanksgiving; Solstice; Justice; Flower Communion
- Advent Sunday Evening Worship Services
- Led these while Rev. Ellen on sabbatical: Love; Earth Day; Mother Day; Membership Appreciation/Recognition; LFF/REFF Appreciation Sunday
- Co-Coordinated: Ingathering Service Collection/Delivery to Food Pantry; Winter Service Gift Givig for Lowell Transitional Center
- Chapel Sundays Monthly followed REFF UU Themes and Soul Matters Themes-Refer to REFF#4

3. "RE" Faith Formation Programs: Pre-K through High School

Attendance on Sunday morning about 6 to 10 children/youth joining weekly. REFF families children: Rawding, Woodmansee, Graham, Worthen-Johnston, Moore, and Owen. On occasion guests or grandchildren of members attended. There were sprinkles of youth participation in other events
General

2023-24 REFF Curriculum:

- "RE"FF UU Monthly themes integrated with Soul Matters Curriculum.
 - K to 4th: Environment and yoUU
 - 5th to High School*: Crossing Paths (Neighboring Faiths)
 - Note: REFF Pre-k to 12th grade (program adjusted per attendance)
 - Field Trips: Quakers; Episcopalian; Hindu; Walden Pond
 - High School Room no participants (occasional special church events)
- Events E.g.: Halloween Parade/Trick-or-Treating in graveyard; Friendsgiving Potluck; Holiday Party; Holiday Pageant for Christmas Eve Early Service, La Posada; Seder/Last Supper; Chocolate Bunny Ritual; Egg Hunt; Movie Day; Field Day
- Participation in Worship, FPCC Covenant Reading, Chalice lighting; Call to Worship,
- Special/Social Justice Projects: Mitten Tree; Ice Cream Social Planning; Annual Jollene Dubner Park Clean up

The High School Youth:

- Specific participation: Liam (Artemis) W-J, as Nursery Staff
- Coming of Age (COA): We did not offer the program this year. Next time: 2024-2025
- Our Whole Lives (OWL): Cohort with other local UU Churches; 5 Youth attended 7-9th

REFF/FPCC Child Dedication:

- June 9th, 2024:
Eviana, Child of Amanda and Tom Salowsky

4. Lifespan Faith Formation/"RE"FF Council

Molly Rawding, as sole member of RECouncil because of the reduction of the size of REFF program, maintained communication with LFFD, and families. We held monthly meetings and in addition she volunteered on a monthly basis to the REFF Sunday morning program. Also, co-coordinated Ice Cream Social in February and other REFF events.

Personal note: I am very grateful in this transitional year for Molly Rawding's support which has been an inspiration to me, and the REFF program as a volunteer and the Rawding family as a role model.

LFF/REFF Council FYI Note:

- Jan-2022; RECouncil unanimously voted on merging LFF and REFF; for the purpose of budget and support with promotion/ideas and continuity of programs and FPCC Religious Education Charter update.
- Feb 2022. Standing Committee Approved official merger of programs LFF and REFF.

5. Administrative/Committees

Administratively:

Staff Meeting; RECouncil; Standing Committee

- Coordinate communication about gatherings, and the gatherings
- Updated and Maintained Communication/Announcements: bulletin boards; social media; Misc. Admin
- LFF Website; Yodek (downstairs entry screen weekly)
- Acting Staff Supervision during Rev. Ellen Spero-Rowse Sabbatical
- Spirit of Life Team Meetings/Events attended/supported when possible

Nursery:

- Hiring protocols/training. Including assisting with set-up/break down of REFF Sunday Mornings.
- Staff: Rosemary McMullin; Liam (Artemis) WJ; Tarana Osmani (Nov through May)
- Caroline Snow volunteer throughout the year
- Please note there was not regular attendance in Nursery Room

Professional Development:

- DRE/LAREDA Cluster Monthly Meetings
- Spirituality and Practice Courses: Advent/Lent Retreats
- Multiple Miscellaneous. Transitional UUA Workshops and online information

Music Director Annual Report for 2023-2024 Church Year

I am so pleased to write about what has been a tremendous musical year at First Parish UU in Chelmsford. There were many notable musical experiences for our musicians and congregation alike, and in many ways I felt we grew from what was already a very successful year last year.

This year began with two months of summer services where the music and liturgy were lay-led, as per tradition. At this time, my weekly hours are reduced from 25 to 5. There was little work I did during Summer 2023, other than making sure music leaders for summer worship abided by the laws of copyright, attending a workshop on bell choir direction, and most importantly, attending the July annual conference of the Association for Unitarian Universalist Music Ministries (AUUMM), of which I have been a member since joining the staff in September 2022. This conference was a life-changing event for me. I was finally able to connect with other professionals in the field of UU music, build important skills in areas where I have room for growth, and learn about trends in the larger denomination of Unitarian Universalism and the direction we are going musically. I brought back many thoughts and ideas from this conference to my work, which I implemented over the course of 2023-24.

For those who are unaware, last October I was accepted as a candidate for the UUA's Music Leadership Certification Program, which summons music leaders to their calling of music ministry, enriches their service to Unitarian Universalist congregations, and enhances their professional perspective and skills. Through the certification program, music leaders develop a foundational understanding of three main areas of knowledge: music skills and resources, UU heritage and values, and leadership and interpersonal skills. This program requires six courses taken online and at the AAUUM conference in person. I have already completed two courses, "UU Theology and Hymnody" and "Navigating Congregational Conflict," and will take two more at the conference this summer: "Leading a Rehearsal" and "Leadership of Congregational Singing." This program also requires me to meet twice annually with my sponsor, Cindy Gist, and my UUA-appointed advisor, Mary Cunningham, to set goals and evaluate my progress in the three areas mentioned above. The assessment of the sponsor and advisor was that my growth this year was satisfactory.

Services in the Sanctuary resumed for the year on September 10, 2023. The Senior Choir had a very strong year for them. Attendance over the course of the year varied from 6 at the lowest to 16 at the highest, with an average attendance of between 11 and 12 - this, as well as the fact that the choir sang virtually every Sunday with some exceptions, should not be taken for granted! One thing I have learned from connecting with colleagues at other UU churches is that we have an exceptionally strong music program for a Merrimack Valley church of only 170 members. I have learned of churches double or triple our size who have a choir that only sings every month or every six weeks, as that's all they have the capacity to develop. If you are a choir member, give yourself a pat on the back, and if you're not, let a choir member know in the fall that you appreciate them!

The Senior Choir tackled a diverse and extensive variety of music this year. Some examples include: popular selections such as those by Bob Dylan and Joni Mitchell, Gospel-style anthems by Greg Gilpin and other songs from Black traditions, the popular Spanish Christmas song "Mi Burrito Sabanero" (which also featured Ian and Caitlyn McIntyre on violins, Brian Snow on guitar, and Kevin Snow on percussion). Of special note was the choir's challenging work in March - Early Music Month - when they did three Renaissance vocal works from different genres: a madrigal by Arcadelt in Italian, a mass movement by Palestrina, and a frottola attributed to Josquin about a cricket, that Kevin Snow conducted in my absence. Many have expressed that the choir's technical level, quality, and variety have increased over the course of the past year.

The Junior Choir/Youth Choir also did good work, with a stalwart attendance of five core boys. Some of their work included "I Want a Hippopotamus for Christmas," "If I Had a Hammer," "Make New Friends

But Keep the Old,” and Purcell’s “Come, Ye Sons of Art,” and “The Rainbow Connection,” both done in collaboration with our Senior Choir.

Much praise is also due to our instrumentalists (Brian and Kevin Snow, Janice, Henry, and Mark Tervo, Ian and Caitlyn McIntyre, and Jessica Volk) who participated in many services throughout the year, especially on Easter Sunday when they joined as an orchestra to play three hymn arrangements by me, Purcell’s “Come Ye Sons of Art,” Handel’s “Hallelujah Chorus,” and most notably, two movements from a symphony that I composed – one expressly written for the ensemble, and one from eight years ago that I arranged for the service. The music for Easter in particular was extremely well-received. I hope to continue this tradition as long as we have the participants to make it happen.

The Bell Choir also performed at three services this year, all of which were very well-received. This year we had a set of handchimes on loan for free from the local chapter of Handbell Musicians of America, which we used in some of the selections. I also brought in experts such as Jenn Stack from the HMA, and subs to fill in when we did not have enough people to ring a rehearsal without them. I offered to direct the Bell Choir for a good portion of the year. According to my job description, my contractual obligation in regard to the Bell Choir is to “support” them. I felt acting as director and conductor would be a way I could serve in that capacity. In April, I decided to step back as director of the Bell Choir to allow them time to assess which direction they would like to go and what support they feel they need from the Music Director.

This year, some new musical elements were introduced to our worship. A notable one is the formation of the Jam Band (which is under the jurisdiction of REFF), which performed on May 5, 2024 in the worship service. I have heard that the people participating have a great time. I also introduced Community-Style singing to the congregation in the spring, which has become much more popular at UU churches across the country. Four songs in this style were sung: “If Not Now,” “May I Be Empty,” “Sanctuary,” and “Make New Friends.” I am so glad that this church understands the vital importance of congregational singing.

This year the music library has been completely sorted and noted in the database, thanks to the tireless efforts of Cindy Gist, Kim Gist, Beth Benoit, and Elaine Mahoney. This will now make it much easier for me to find pieces in our library for our choirs to sing. Our instruments are also being well taken care of.

We also need to acknowledge those who have left our music ministries after years of excellent service and participation. Kim and Richard Graham are moving to Salem. Richard especially was a huge contributor to the Youth Choir. Ian and Caitlin McIntyre also decided to attend a church closer to their home in Maynard. They were not only beloved members of the choir, but frequently contributed to our service through their violin and viola playing. They will all be sorely missed.

This has been a great year for the music program. I look forward to next year already!

Respectfully submitted,
Dr. Christopher Grills
Music Director
First Parish Unitarian Universalist in Chelmsford

Office Assistant and Building/Events Coordinator Annual Report, '23-24

This is my third year assembling this State of the Society Meeting packet, and my second year writing my own report to include in it- how the time flies! The 2023-2024 church year gave the impression of being on the quieter side, but I think this was a reflection of me having grown into my role and found my groove in the office. Which I am grateful for, given that Rev. Ellen's sabbatical required a lot of prep work ahead of time, and introduced some new responsibilities to my plate during its duration.

Building use remained steady year round with our repeat and long term renters, and one-off renters had a downtick in the second half of the year after a busy winter. Having been the building and events coordinator for about a year and a half now, I have noticed some gaps and inconsistencies within our building policies, which I hope to help assess and address sometime in the next church year.

As in my first year, revitalizing our social media presence and outreach was not at the forefront of my task list, as preparing for sabbatical took precedence, though some strides were made nonetheless. I hope in the coming year to work on it further, now that my first year challenge of learning this role, and second year challenge of sabbatical, are now behind us.

One other challenge in the second half of the year was the replacement of the office computer (as well as the treasurer's computer, and the LFFD laptop). While my desktop can still plug along, it is showing its age and retiring it is a sound option. Thank you to Dave Kaffine, Tom Coffey, and John Fisher for lending some of their tech knowledge and experience to the search for new office machines. This search also revealed another gap that needs working on- lack of IT/infrastructure support. I hope this can be pursued in the coming year as well.

Amidst all of that, I continued refining the process of producing the announcements, newsletter, orders of worship, etc. I hope to introduce some changes in September that will allow me to optimize my time in the office, improve my communication with the congregation, and keep the office a well-oiled machine.

I also continue to be grateful that the church supports me so thoroughly in this role- I am certainly aware of its importance, and hope to give back as much as I receive!

Submitted respectfully and with gratitude,
Erica Clifford
Office Assistant and Building/Events Coordinator

Building Report Year ending June 2024

July 2023

1. Did monthly inspections. (fire extinguisher, first aid, AED, and elevator phone checks and drained drip tank)
2. Did quarterly testing of emergency lights.
3. Repaired walkway tom vestry
4. Had Vestry floor refinished
5. Annual smoke detector & sprinkler testing

August

1. Did monthly inspections
2. Repaired the walkway to the vestry.
3. Replaced the kickboard outside the backdoor.
4. Replaced the ceiling in the vestry hallway (it fell down).
5. Delineated the way in the kitchen back room where no storage is allowed.

September

1. Did monthly inspections
2. Annual Fire extinguisher inspection
3. Had the flat roof replaced
4. Repaired the ceilings in parlor/restroom.
5. Power washed the shed and repainted it
6. Painted the boards that were replaced by the replacement of the flat roof

October

1. Did monthly inspections
2. Annual state Elevator inspection
3. Removed air condition units.
4. Annual heating system (boiler) servicing.
5. Painted boiler room & Kitchen doors
6. Replaced the Flag holders screws with Toggle bolts.
7. Sealed the hole in the front of the building
8. Added security chains to the chandeliers in the attic.
9. Replaced burned out bulbs in the sanctuary chandeliers.

November

1. Did monthly inspections
2. Changed clocks to Eastern Standard Time.
3. Researched replacement for Photocopier and Color printer

December

1. Did monthly inspections
2. Replaced Bulbs in Chapel
3. Visited ACAL with Church administrator to evaluate new Copier/Printer

January 2024

1. Did monthly inspections
2. Installed new Copier/Printer

February

1. Did monthly inspections
2. Assisted DRE with printing to the new Color Copier/Printer
3. Meet with the building inspector to do both Nursery school annual inspection and the Church 5 year inspection
4. Reset On Demand hot water heater

March

1. Did monthly inspections
2. Fixed door locks for nursery, office and Minister's office
3. Changed the clocks to Daylight Saving Time
4. Reset the Yodeck (TV in the hallway)
5. Met with plumbers because I couldn't reset the on demand water heater
6. Met with the water department to test the backflow valve.

April

1. Did monthly inspections
2. Met with 3 Plumbing companies to get quote to replace

May

1. Did monthly inspections
2. Cleaned HVAC system in the offices, Chapel and outside units.
3. Had torn screen repaired in Office
4. Painted two new columns by the vestry door

June

1. Did monthly inspections
2. Contracted to have the vestry floors refinished this summer.
3. Had the window sill repaired next to the vestry door.
4. Had torn screen repaired second floor hallway

Submitted by: Walter Cole, Ron Cook,
and Tip Rawding

Grounds Annual Report 2023 - 2024

All of last year's Stewards Who Tend the Lawn, the Gardens, the Shrubs and Trees of our church had a few new members that helped for a while tapering off towards the end of the season.

On Lawn Maintenance - Bob Morse, Paul Buckley, Jonathan Crockett, Andrew Crocket, Tip Rawding, Gail and Michael Burati, Matt Scott, and Zac Scott.

Adopt a Plot Gardening Team - Deb Grad, Kathy Talbot, Leslie Yauckoes, Diana Keohane, Molly Rawding and family, Nancy Kaelin, Gail Pickering, Rebecca Gore, Amanda Maclean and Martha Sherburne.

Pruning - Paul Buckley, Martha Sherburne, Tip Rawding.

Fertilizing - Michael Burati, Martha Sherburne.

Another Awesome job was done by all our teams this year. We were short on bark mulch so we ordered a second batch of mulch. Cleanup went well for the Fall and Spring. Unfortunately the fall fertilizing was skipped. The cold came in fast and the Hospital was not the place I wanted to be. I was able to pass the word to Nancy Kaelin about getting the snow poles in the ground for the Winter. She rounded up Tip and Paul I believe. They got them in, before the first Snowfall. Thank you.

Spring was a very late cleanup start. Even though I was home, a warm Spring was not emerging. It was cold!!! A window of opportunity opened up. We all pitched in and got it together, Lawn and Garden Stewards. Thank you to Jeff Ellis for taking down the Snow Poles. Paul Buckley for pruning our Crab Crabapple tree. Nancy Kaelin and all others who pitched in and cleaned beds etc. Tip Rawding for taking the bags to Jones Farm.

Dolores had asked for a 6' Tree to be planted in the Children's Legacy Garden. I presented my findings to the Standing Committee. Upon research I found that a 6ft tree does not exist. It will always be a little bigger than facts stated. The White Snow Fountain Weeping Cherry Tree had a shallow root circumference of 9 ft in diameter. It had the capacity to interfere with the yew, the Chapel sidewalk, the town sidewalk and our parking lot.

Recommendations - the Children's Legacy Garden is too small for any Tree. Shrubs, Perennials, Annuals, Ornamental Grasses, we have that fit the spaces and conditions of the area are allowed.

The Weeping Cherry could either replace the Crabapple Tree or Magnolia Tree when either of them fizzles out.

Last year's wishes - More Stewards for both teams are in the process of recruiting. I have a few names for Adopt a Plot. The Heat has to go down some please. We are working on major projects at this moment. In Progress now:

The Fringe Tree.

Gardens being weeded, dead headed, thinned out, mulched as needed.

To be done :

Pruning.

Fertilizing back on track.

The Japanese Maple Trees and Circles.

We welcome anyone interested in being a Good Steward of the Earth and Our Church to join us. It is a Wonderful Space for Spirituality, Friendship, Fun and Making Things Grow! We really do have lots of fun!

Please Contact Martha Orr Sherburne, Chair: Prairie7dog7@gmail.com

Membership-Hospitality Committee Annual Report 2023-2024

Committee monthly meetings 3rd Sunday.

Membership-Hospitality Committee: Co-lead by Carla Corey; Chris Sweetnam; Elaine Mahoney; Frans Janssen; Leslie Yackoes; Rose Lerer- FPCC Clerk, Dolores~LFFD (oversee committee on their behalf)

- There was a strong return to church life by returning congregants and many newcomers and visitors. Further assessment of challenges due to the pandemic of families not returning did not deter those on the Committee. On the contrary they placed more of an emphasis on reaching out and communicating by welcoming new members, friends and members. It was most evident during social hour and other reach out events like: Fall/Welcome Back Potluck Talent Show and offering occasional tours of First Parish Church led by Bonnie Rankin. Also offering Hymnals as needed to those viewing services online.
- Carla Corey and Rose Lerer, FPCC Clerk, took the lead in reaching out beyond First Parish doors and social hour.
- Further outreach was achieved by continuing to display the A-Frame Signs purchased the prior year to announce regular church year worship and summer service welcoming everyone at the main entrance. Committee recommends permanent sign on 'new' front entrance.
- New UU Course: March 30th. Co-lead Rose Lerer, FPCC Clerk and Dolores, LFFD. Held as a one-day retreat, feedback pleasant and successful. Luncheon offered during retreat well represented by church committee members: Joan Coyne; Worship/Web Chair Caroline Snow; CFAM Chair; Aggie Brennan; Ushers Chair; Neil Harmon, SC Chair; Beth Benoit, Music Chair;
New UU Participants:
 - Gwen Meins, WCC
 - Elaine Mahoney, signed Membership Book, Membership Hospitality/Choir +
 - Amanda MacLean, young adult: signed Membership Book; Green Committee +
 - Hollie Kaduboski, young adult-graduated off to college
 - Wendy Gillespie, co-leads Sacred Circle SG
 - Marilyn Zwiercan
- Intergenerational Membership Service May 5th.
- Recognition of Member Years:
 - New Members: Elaine Mahoney; Susan Tripathy; Amanda Maclean
 - Five: Leslie Small; Molly and Tip Rawding; Leslie Koresky; Michelle Boissonneault
 - Ten: Neil Harmon and Robyn Long-Navas
 - Twenty-Five + (ref. pandemic) Mary Gaynor; Frances Killam; Rose Lerer Dorrit Lammers; Deb Grad; Yoko Sano

Respectfully Submitted, Gratefully,

Dolores GHeredia-Wood Lifespan Faith Formation Director;

on behalf of Membership-Hospitality Committee

Music Committee Yearly Report

The Music Committee's role is to support First Parish's music program. Primarily that means supporting and being a sounding board for our Music Director and making sure there are funds to: care for the instruments (piano, organ, handbells), purchase music, pay for streaming rights for worship services, pay for membership in the Hand Bell society, and pay soloists and substitutes.

Dr Grills has entered into the UUA Music Leadership Certification Program, which the Music Committee Enthusiastically endorsed. The Music Committee is committed to supporting him in meeting the requirements of that program.

The big Music Committee project this last year has been working to get the choral music files in a usable state. Dr. Grills had reported that while we had a database of our music he couldn't find the pieces he wanted to use in the five file cabinets. Also the file cabinets were packed to the brim, making it almost impossible to refile a piece once you pulled it out. There were boxes of music stacked on top of the file cabinets. And we had music taking space in our files that no longer fit modern day UU sensibilities or were unlikely to ever be used again in our music program.

The music committee started a communal effort to evaluate our music; we quickly found it went more efficiently with a small team of 4 people tackling one drawer at a time. One person to pull out the music and refile it, another to count how many copies we had, Dr. Grills to decide (consulting the team) whether we wanted to keep each piece, and one person to update the database. It took many person hours, one hour at a time, over the course of the entire year. The team purged more than 8 file boxes of music from the file cabinets, made an excel sheet of what we are discarding, and alphabetized the cast offs in the boxes. Outreach is in process to offer this music to various local choir directors.

Next year the Music Committee is planning to find homes for the old Red and Blue hymnals, which are stacked in various places in the choir loft.

Membership on the Music Committee is open to anyone interested in current or future music programs. New ideas are always welcome. We only meet when we have agenda items, so only a few times over the church year. Our purpose is to support Dr. Grills but also to be a conduit for congregation input. Please feel free to contact any of the committee members: Beth Benoit, Lisa Calvo, Cindy Gist, Barry Jefferson, AliciaPage, Brian Snow, Maura Snow, Henry Tervo, or Janice Tervo. Or Dr. Grills of course!

Pastoral Care and Service Team Annual Report 2024

It was a busy year for our team with Ellen on sabbatical but we had the steady hand of Brian Snow to lead us through. Brian led Joys and Sorrows and served as Chaplain for four months to cover for Ellen's absence.

We started the church year with Ellen running pastoral care training sessions for all of us. We had some new members who had not been through any formal training in the past but even the long-term members appreciated the sessions.

This year we continued to host a table at social hour to create a presence and to also provide cards for folks who would like to send greetings, condolences, and best wishes to fellow congregants. The table also gives us a place to be more visible to folks who may want to check in or have a chat.

Maura Snow continued to host a monthly First Friday Zoom Cafe at lunchtime for anyone who would like to connect. This has been helpful for those who can't make it to church physically but want to retain their connection to fellow First Parishers.

Erin Clifford graciously stepped up to host Healing Conversations once a month for those who are dealing with grief and all that goes with it. Kathy Deschenes leads the group once a month as well.

Sandy Johnston and Linda Newhard continued to send cards to parishioners who need some support or are celebrating life events such as milestone birthdays, new homes, and welcoming new family members.

The prayer shawl ministry has had its struggles but continues on. We want to thank all the knitters in the church who give so much of their time and talent to comforting those in need whether they are church members or not.

We kept in touch regularly with those who cannot make it to church by making phone calls and visiting, all in support of Ellen's pastoral care ministry.

We are hoping to have a mini-retreat of sorts for our team to help us discern where our gifts are best used and what we should do about the meals/rides program that had been offered but now has no one to lead it.

Respectfully submitted,

The Pastoral Care and Service Team

Sandy Johnston, Cheryl Wilson, Frans Janssen, Brian Snow, Maura Snow, Liz Peterson, Erin Clifford, Linda Newhard, Tom Coffey, and Kathy Deschenes (chair)

Sabbatical Committee Annual Report 2023-2024

Our goal was to provide a smooth transition of ministerial coverage while Reverend Ellen Rowse Spero took sabbatical February 5- May 26, 2024.

To achieve this goal we hired Reverend Russ Menk as our Sabbatical Minister. Chaplin Brian Snow and the Pastoral Care and Service Team provided on call care for pastoral emergencies. Dolores Heredia-Wood covered staff meetings and addressed any staff issues that came up.

The Sabbatical Committee put together a Sabbatical Guide which provided information about the practice of Sabbaticals, a list of who you could contact for different church related services and who would be in the pulpit each week. These were distributed throughout the church and available online.

We also worked closely with Reverend Ellen Rowse Spero, the Treasurer, the Worship Committee, the Pastoral Care and Service Team, Human Resources, Dolores Heredia-Wood and Erica Clifford, to make this process and transition as smooth as possible.

We would like to Thank the Congregation and all of the volunteers who made this time of rest, relaxation and reflection possible.

Sincerely submitted,

The Sabbatical Committee

Gail Burati, Joan Coyne, Cindy Gist, Liz Peterson, Bonnie Rankin and Ruth Whalen-Crockett

Website/Publicity 2023-2024 Annual Report

Publicity

We did not do any publicity this year.

Website

Our focus for 2023/2024 was to launch the new WordPress website. During the summer, we met with Dolores and members of the Welcoming Congregation, Membership, and Lifespan Faith Formation (LFF) to work on the content of the new site. We also worked with Erica during this process, to help define her role in updating the website, and coordinating the website with church social media posting.

We originally planned to keep the LFF section of the site separate from the main site. After working with Dolores on content for the main site, she decided to move her content to the new template as well. Now the content for both sites are on the same uuchelmsford.org WordPress site. There is no separate LFF WordPress site anymore.

We had the new site up and running by the middle of September. Not all of the content was there, but we added more pages as the year went on.

Our committee is still updating the weekly Worship Schedule, the monthly Soul Matters and Share the Plate (if there is one). We share updating the Calendar and upcoming events with Erica and Dolores. Dolores updates the LFF pages. We continue to post weekly sermons, although we did not add all 15 years of our sermon archives to the new site. We have audio sermons going back to 2023 up currently. We do plan to add a few more years, but have not had the time yet. We don't plan to add them all, but we do have them all still archived.

Google Workspace (not really web, but didn't know where else to put this)

This year we continued encouraging committees to take advantage of Google Workspace. We encouraged more committees to use GoogleMeet for meetings in the fall because the Zoom account was becoming harder to use due to issues with multi-factor authentication used by both Zoom and Gmail. We decided to discontinue the Zoom account in March, so we switched online Social Hour to GoogleMeet in February. More committees added committee lists this year. We are up to about 21 committees using Google Group email lists, and about 15 have Google Drives.

There is still work to do to create spaces to post documents that should be available to members, and to make them easy to find. Items like Standing Committee minutes, reimbursement forms, Faith in Action forms, the Warrant for congregation meetings. Erica and I will be working over the summer to work on that.

As chair, I would like to thank my committee for all the work they did this year. Members: Eliot Mayer, Barry Jefferson and Sue Jefferson (website) and Dee Halzack (publicity).

I'd also like to thank Dave Kaffine, who handles all the sermon posting both audio and video recordings. He's not a member of this committee, but he does all that work for us, and manages all those pages.

Respectfully submitted,
Joan Coyne
Chair

Welcoming Congregation Committee Annual Report September 2024

The Welcoming Congregation has continued to be active. We have continued our relationship with the Chelmsford DEI committee. We have a liaison (Warren) who attends DEI meetings.

We collaborated with the DEIC on the Transgender Day of Remembrance and the Transgender Day of Visibility Town Hall, both held at the CCA, a venue provided by the DEIC, and both events were well attended. We will continue to work with the DEIC.

This year's TDOV Town Hall theme was Transgender Health is Public Health. We brought in Genny Bemy, the director of the Stonewall LGBTQIA+ center at UMass Amherst to do our Sunday morning service, and to anchor our town hall panel in the afternoon. Our panel included several other voices: Jessica Wisocky from Pathways to Better Health; Danielle Koutsoufis, Chelmsford Fire Captain; and Hollie Kadouboski representing transgender young adults.

Additionally, we are establishing relationships with the Welcoming Teams of Welcoming Religious Denominations in Chelmsford. We hosted a potluck gathering in July at the church with members from as many of the welcoming congregations in town as could attend. Including Congregation Shalom, Trinity Lutheran, and Aldersgate Methodist. The Congregational church could not participate as their pastor's memorial service was held that day, but they were interested. Also, the Episcopal church's pastor has a transgender child, but could not attend the lunch because he was participating (like most of the clergy in town) in the service at the Congregational church. We intend to have a second annual potluck next year. Attendees agreed we would like to collaborate more on events.

We have tabled in the Vestry and participated in events on the Town Common (weather permitting). We participated in Chelmsford Pride, hosting a table with stickers and informational resources. Frances did face painting. Frances also offered face painting at Lowell Pride. Warren attended Boston Pride and met the minister from All Saints Episcopal Church here in town.

Deirdre continues to post on our Facebook page and in our group to honor the special dates in the LGBTQ+ communities. We look for various ways to mark those dates. Dee and others post about news from and about the LGBTQIA+ community, good or bad. We have shared news about legislative developments, including the encouraging news that ALL anti-trans bills in Georgia failed to advance this year. We welcome sharing from others. Our posts in support of the LGBTQIA+ community have been well received. The Facebook posts are a way to reach out beyond the church and among those who have joined in the past year is Bernie Wagenblast, the voice of the New York subway system, who transitioned after becoming well known.

We partnered with Ellen and Dolores (Faith Formation), to bring back Coach Justice who previously led a workshop for our congregation. Coach Justice led a sermon on January 14th based on his book *Deconstructing the Fitness-Industrial Complex: How to Resist, Disrupt, and Reclaim- What It Means to Be Fit in American Culture*. Copies of the book were offered during coffee hour courtesy of a Faith-in-Action Grant. We then led a book club with Coach Justice on February 11th which many people attended and the discussion was lively and engaged. Several attendees expressed a desire to bring Coach Justice back in the future.

The Committee continues to support the LGBTQ+ community by observing important dates, advocating on issues, and educating the congregation. We are always looking for new ways to do so. We welcome suggestions and new members who want to help us in that mission.

Our meetings are usually held on the second Sunday of the month, at 1pm, on Google Meet, with occasional variations because of holiday weekends. We occasionally meet in person after church. If you'd like more information or to check us out, email welcoming@uuchelmsford.org, or see us during Social Hour.

Respectfully submitted, Dee Halzack (co-chair); Deirdre Heck (co-chair); Jackie Diamond; Warren Flewellen; Frances Killam; Abbie Ransdell; and Kedar Thomas

Annual Report of the Worship Committee 2023-2024

This was our first year together as a Worship Committee, and a new incarnation of the Worship Committee after several months without one. We started the year reading the book "Worship that Works" to help us learn more about worship, and to give us ideas for the year.

One of our goals for this year was to try to make the organization for Sunday mornings easier. Aggie took on the responsibility for signing people up for chalice lightings each Sunday, and we went back to the practice of having different committees choose a month to be responsible for doing Welcome and Announcements.

Worship Summit

We held a Worship Summit in November with the Worship Tech Team, Chat Hosts, Online Social Hour Team, and the Web Team to check in with those teams about online worship, Sunday morning issues, and anything they wanted to bring up. We talked about doing a survey of the congregation about online worship, but ended up deciding against it since the Spirit of Life teams would be asking many of the same questions we wanted to ask.

Sabbatical Support

While Rev. Ellen was on Sabbatical we supported Rev. Russ Menk, our Sabbatical Minister. Each week, we helped him find readers and someone to do the covenant, making sure the committees doing Welcome and announcements knew whose turn it was. On the weeks where we had guest ministers/speakers or congregants doing the service we worked with them to make sure they had what they needed and helped them get the Order of Worship ready. We made sure to keep the Worship Schedule in Google Docs up to date so everyone helping us on Sunday was on the same page.

This year was a learning year for us, as it was the first year for all of us on this committee. With it also being a Sabbatical year, I think we learned a lot. One of the things we talked about a lot with Russ was the importance of reducing the work of putting together the Order of Worship every week. Scrambling at the last minute for readers/covenant readers was challenging, as figuring out who was doing which part of the service when we didn't have Russ in the pulpit. Some of this will be less of an issue when Rev. Ellen is back, but I think this is something that the Worship Team can take off Rev. Ellen's plate with some better planning methods next year.

Respectfully Submitted,

Joan Coyne, Chair

Members: Aggie Brennan, Neil Harmon, Brian Snow, and Rick Warner