Cover image: Roll and Stroll, May 2016.
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WARRANT FOR CONGREGATIONAL MEETING
FIRST PARISH IN NEEDHAM, UNITARIAN UNIVERSALIST
SUNDAY MAY 21, 2017 AT 7:00PM

From: Marguerite Robbins, Clerk of First Parish in Needham, Unitarian Universalist

Greetings. In the name of First Parish in Needham, Unitarian Universalist, you are hereby required to notify and warn the legal voters of said First Parish to assemble in the church sanctuary, 23 Dedham Avenue, in Needham, Massachusetts, on SUNDAY, May 21, 2017 at 7:00pm then and there to act on the following articles, to wit:

ARTICLE I To hear reports from the President, the Minister, and such others as have reports.

ARTICLE II To elect the following candidates put forward by the Nominating Committee as Officers and Representatives of the Parish for the upcoming church year. For 1-year terms: President, Vice President, Clerk, Treasurer and Auditor. For 3-year terms: Trustee of Invested Funds, Nominating Committee, and two members of Parish Committee. One member of Parish Committee will be elected for a 1-year term to fill the position being vacated by the resignation of one current member of Parish Committee.

As President – Gail Hedges
As Vice President – Beth Sargent
As Clerk – Katie Edwards
As Treasurer – Tim Brennan
As Auditor - Katie Barnett

And to elect the following candidates for the listed positions:

For Trustee of Invested Funds - John Gallo
For Nominating Committee - Amy Cicala
For Parish Committee member one year – Jackie Boni
For Parish Committee member – Alan Robins
For Parish Committee member – Tracy Zendzian

ARTICLE III To authorize the Parish Committee to appoint up to six delegates of First Parish to the UUA General Assembly.

ARTICLE IV To update First Parish’s bylaws. These changes were initially proposed at the Special Congregational Meeting on February 12, 2017. Parish Committee has considered the discussions at that meeting in revising the proposed changes.

Trust Income:
Bylaw Article VIII, Section 6: Add “The distribution must be approved or declined, in whole or in part, each year by the Parish Committee prior to the conclusion of the Fiscal Year.” after “Subject to any restrictions applicable to income earned on restricted gifts, legacies, or special purpose funds.” The new text shall read (changes underlined): “The amount to be distributed will be determined by multiplying the beginning value by the percentage determined by the Trustees. The distribution must be approved or declined, in whole or in part, each year by the Parish Committee prior to the conclusion of the Fiscal Year.”
The Parish Committee voted to endorse this Bylaw change on April 19, 2017.

Committee on Ministry:
Bylaw Article VI, Section 4: Change "one person" to "one or two persons". The new text shall read (changes underlined): "In June of each year, the Parish Committee shall appoint one or two persons to the Committee on Ministry in accordance with Article X."

Bylaw Article X, Section 1: Delete the first paragraph ("The Committee on Ministry shall consist of three members appointed for a three-year term, one member to retire each year. One member, selected from a list of three names submitted by the Minister, shall be appointed by the Parish Committee in June of each year. No member of the Committee on Ministry shall serve concurrently on the Parish Committee."), and replace with the following:

The Committee on Ministry shall consist of three to six members, each appointed for a three-year term. The goal is that each year the three-year term for one or two members will expire, and those members would be replaced.

New members, selected from a list of up to six names submitted by the Minister, shall be appointed by the Parish Committee in June of each year. No member of the Committee on Ministry shall serve concurrently on the Parish Committee.

If a member of the Committee on Ministry retires before the end of their three-year term, the Minister may submit two or more names to the Parish Committee, who will appoint the person serving as replacement.

Bylaw Article X, Section 1: Amend the fourth paragraph by doubling the quantities (one becomes two, three becomes six, and six becomes twelve). The revised fourth paragraph shall read as follows (changes underlined):

When a new minister is called, the then members of the Committee on Ministry shall resign. A new committee will be formed by the Parish Committee by selecting up to six names from a list of up to twelve names submitted by the new Minister. Two of these members will be appointed for a three-year term, two for a two-year term, and two for a one-year term.

The Parish Committee voted to endorse this Bylaw change on April 19, 2017.

ARTICLE V To hear the report of the Treasurer and determine an operating budget for fiscal year 2017 – 2018.

ARTICLE VI To hear reports from the Social Action Committee on becoming a Sanctuary-Supporting Congregation.

ARTICLE VII To conduct such further business as is necessary.

Hereof fail not, and make due return of this warrant, with your doing thereon, at the same time of said meeting. Given under our hands this 11th day of May, 2017.

Gail Hedges, President
Erik Bailey, Treasurer
Katie Edwards
Geoffrey Austrian
Kristin Neff

Beth Sargent, Vice President
Marguerite Robbins, Clerk
Eliot Jekowsky
Joan Mecsas
Susie Smart
By virtue of the warrant I have notified and warned the legal voters of First Parish in Needham, Unitarian Universalist, of the meeting called thereon by posting a copy of said warrant in newsletters and mailings on May 11, 2017, being at least ten (10) days before holding of the meeting, and causing a notice of the meeting to be mailed to the last known address of every voting member of the Parish.

Attest: Marguerite Robbins, Clerk
MINUTES OF THE 2015-16 ANNUAL CONGREGATIONAL MEETING
SUNDAY MAY 15, 2016 AT 7:00PM

The meeting came to order at 7:36 PM. 56 members were in attendance, which comprised a quorum of more than 15% of the membership.

Rev. Catie Scudera lit the chalice and gave opening words.

A motion was made to approve the minutes of the 5/17/15 annual meeting. The motion was duly seconded and unanimously approved.

ARTICLE I: To hear reports from the President, the Minister, and such others as have reports.

Vice President, Don Leathe gave the President’s report [Gail Hedges was unavailable for the meeting]: Don highlighted sections of Gail’s written presidential report that was submitted for the annual meeting. He commented on an in-house retreat conducted by the Parish Committee in the fall focused on completing a five-year strategic plan. While the final details are still a work-in-progress, we are committed to having a complete plan in place in the next few months and measuring our progress against it regularly, adjusting specific actions to reach the main goals set in the plan:

1. Growth with an eye to diversity, retaining and developing our current members while appealing to those who are not fully represented in our church community through worship, music, and programming;
2. Financial stability by cultivating a culture of abundance and generosity so we can support our dreams;
3. Making social justice central to our identity, activities, and programs, continuing our ongoing work on the environment, racial justice, and being a welcoming congregation;
4. Expand multi-generational opportunities to engage in fellowship, spiritual growth, and service for our children, youth, adults, and elders.

Don highlighted the fact that we began a trial year of theme-based worship, weaving a monthly theme into as many activities at First Parish as possible including Religious Education, Continuing Education, Youth Groups, Small Group Ministry, and some social events. We also successfully completed a trial of sharing the collection each Sunday in lieu of donating the entire plate one Sunday a month.

The summer found us celebrating the completion of the Fourth Century Fund and recognizing those who spearheaded it. Throughout the summer and fall months, the Social Action Committee and the Green Congregation Committee educated us all about Commit2Respond, and, in November, a congregational vote affirmed our commitment to environmentalism and activism on behalf of vulnerable communities.

In the fall, we enjoyed a successful (financially and socially) auction thanks to Katie Edwards, Jen Robins, and their many helpers. In December, we were the happy recipients of the gift of two grand pianos, enhancing our music program and enticing additional renters for music recitals and other events.

A Safe Congregations task force began meeting to establish policies and practices to meet various emergency situations. Our successful, first-ever fire drill demonstrated the importance of this planning. This group continues to work on ways we can be safe, and the staff has established guidelines for emergency (weather) closings and the more upbeat guidelines for wedding rentals and other occasions.
Our building is buzzing with First Parish and Temple Beth Shalom activities. We gladly continued our long-term mutual support by welcoming Temple members while their building project progresses much as they welcomed us during our renovations several years ago.

*Rev. Catie Scudera gave the minister’s report.* She highlighted several items from the written staff reports submitted for the annual meeting. We brought on four new staff members, including a cleaner, sexton, the assistant DRE, and youth coordinator, not to mention the new regular choir section leaders. She is grateful to the congregation to help get these new staff members adjusted to the church. She hopes that tonight the last “piece of the staff puzzle”—a bookkeeping service to round out our administrative staff—will be voted into the 2016-2017 budget.

One of the administrative challenges, though not an unwelcome one, has been hosting Temple Beth Shalom during its construction year, as they did for us in 2007-2008. We are thankful to be able to return the favor. Our facilities have been a bit more cramped this year, and Susanna and Michael have spent a great deal of time acting as our congregation’s primary hosts. Once the construction is done, we have our space to rent, including a new wedding package to advertise. We received more interest from musicians because of the new-to-us pianos, donated from Lorimier and Boni families.

In collaboration with Music Committee, we have had wonderful new participation and scores of new friends contributing. We have lots of new participation in ushers, time for all ages, and chalice lighters. We started on a two-year trial on our theme-based ministry, and we hopes it has deepened our spirituality.

Rev. Scudera discussed the proposed transition in our RE program, where we will be expanding the curriculum map for our “Sunday School” through ninth grade, allowing us to give Coming of Age more time and shift Neighboring Faiths and middle school OWL to more developmentally appropriate age groups. In our Lyceum and adult religious education, she remarked on the successful past year with great partnerships between committees to sponsor events, new spiritual practice groups developing, and lots of opportunities for ethical learning and growing.

Rev. Scudera then laid out the challenges ahead. The number of members of our Continuing Ed Committee has dwindled to a dangerous point and is struggling to find new leaders to take on scheduling our Lyceum series and organizing adult- and multigen-oriented workshops. While we have many talented people in the church interested in facilitating or organizing one-time discussions and series, we lack a core team to keep track of the big picture of adult education.

She concluded with some thoughts about our movement toward our four strategic goals: growing our membership; securing our long-term financial stability; making social and environmental justice central to our collective identity; and, deepening our multigenerational fellowship and learning opportunities. Many of the reports this year mentioned these goals: Membership Committee wanting to do more outreach, the Trustees bringing in a UUA leader to talk to us about planned giving, the incredible work of our social and environmental justice committees, integrating our youth more fully into broader church life. We have plans, small and large, to improve and deepen our faith community.

But we will have some difficult conversations and choices ahead, as change is never easy. With 271 adult members and over 100 kids and teens in the church, our growth could be inhibited by our sanctuary’s seating capacity of 230. We will have to improve and create structures to help newcomers become members, feel supported and challenged spiritually, and stick with First Parish through times of joy and concern. To accomplish our goal of deeper multigenerational connections, we will have to be bold and
compassionate in making strong bonds with one another across societal barriers of gender, sexual orientation, race, age, ability, education and socio-economic status. To accomplish our goal of financial stability, we will have to increase our comfort with talking about money and church funding, if we are to have the staff and equipment we need to support a larger church. (While we have had an impressive increase in pledge commitments over that past two years, we are still underpaying four of our staff members by a significant amount, and thus we need to increase our annual funding.) To accomplish our goal of making justice more central to our identity, we would all need to find ways to plug into our social and environmental justice programming if our faith is to stay relevant in the wider community.

None of that is easy. But, though change is not easy, we also can’t attempt to stay still while the rest of the world shifts around us. To grow and change is to be alive. And our congregation is lively, wonderful, thriving. Rev. Scudera concluded by stressing her belief that we can take on challenges and turn them into rich opportunities. She invited all of us to participate in the conversations, decisions, and mobilization that will be required for us to achieve our 2020 goals.

**ARTICLE II: To elect the following candidates put forward by the Nominating Committee as Officers and Representatives of the Parish for the upcoming church year.**

For 1-year terms: President, Vice President, Clerk, Treasurer and Auditor. For 3-year terms: Trustee of Invested Funds, Nominating Committee, and two members of Parish Committee. One member of Parish Committee will be elected for a 1-year term to fill the position being vacated by nominee for Vice-President.

- As President – Gail Hedges
- As Vice President - Beth Sargent
- As Treasurer – Erik Bailey
- As Clerk – Marguerite Robbins

And to elect the following candidates for the listed positions:

- For Nominating/LDC - Alan Robins, Amy Brown
- For Trustee - Gray Brown
- For Auditor - Gray Brown
- For at-large member – Geoffrey Austrian
- For at-large member – Joan Mecsas
- For at-large member (one year) – Kristin Neff

A motion was made to accept the slate as written in the warrant and seconded. Discussion ensued. A motion was made to amend the slate to make Geoffrey Austrian as a three-year member and Kristin Neff as a one-year at large member and to include Gray Brown as auditor. The Parish Committee has verified that the Auditor does not review/audit the Trustee’s accounts (e.g., endowed funds), so there is no conflict of interest with Gray Brown being both a Trustee and the Auditor. A comment was made to ensure that Kristin and Geoff were okay on the change, which was affirmed by the Nominations Committee.

A vote was taken on the amendment, which passed unanimously. The motion to accept the amended slate was approved unanimously.
ARTICLE III: To authorize the Parish Committee to appoint up to six delegates of First Parish to the UUA General Assembly.

The motion to authorize the Parish Committee to six delegates was made and seconded. Don Leathe explained that there is small amount of reimbursement for those who attend UUA General Assembly. A congregant asked if this is an annual responsibility of the Parish Committee (it is), then why could we not include this duty in the bylaws rather than vote every year. Don acknowledged that was a worthy idea for consideration and we might consider this in future bylaw changes. A congregant asked whether this has any financial cost to the church. Don explained that this small pot of money has already been allocated and is available in the budget, so no net financial implications. The motion was approved by unanimous vote.

ARTICLE IV: To hear the report of the Treasurer and determine an operating budget for fiscal year 2015 – 2016.

A motion to consider the article was quickly made and seconded. As Treasurer, Erik Bailey led the discussion of the church finances. Overall, he summarized FY14-15 year’s finances, reviewed the major accomplishments and year-to-date financials for this year, and walked through the upcoming budget. Our income for FY14-15 (the last year of concluded financials), we received 100% of pledge income, which when combined with increased rents, led to income that was 108% of budget. Our expenses were 103% of budget. Overall, we had a $20k surplus, which helps compensate for an $8k deficit a year earlier (although that includes an awkward 2 month stub period where expenses were incurred but relatively little income was received).

- Phil Lynes reminded us that we only do an auction every other year, which brings in about $20k in income that year but nothing in the subsequent year. Erik said that we had planned for that in this next budget year and will comment on that when he discusses next year’s budget.

In the current fiscal year, FY2015-2016, we welcomed four new staff: Michael, Freddy, Jen, and Sophie. Building maintenance and cleaning has been more expensive than expected by about $5k, partly due to the supplies and consumables like a vacuum cleaner and cleaning supplies. We will not under-budget next year.

- Clark Taylor asked what the annual pay rate of the Freddy and Michael is. Erik responded that it is about $20/hr.
- Vicki Makrides asked why we made the switch. Erik responded that the old cleaning service wasn’t doing a very good job. And as we grow, we needed someone we could turn to help out with events and social hour. Overall, he has heard that the facilities are much nicer because of the change.
- Bob Denoble asked how this affected the child care center. Erik responded that Needham Children’s Center has subsequently moved to hire Freddy to clean their facilities as well.

Erik commented how Temple Beth Shalom has used our facilities, which has resulted in increased operating costs like electricity and sewer. It’s not a big deal, but it was unbudgeted. Phil Lynes asked whether rental income was lost due to the booked space. Rev. Catie does not believe it is that much. The temple typically hosts parenting classes during the day, at times that we don’t really use the space. But it has prevented us from heavily advertising the space for weddings, etc.

Erik has done a lot of work cleaning up QuickBooks database as of July 1. This has no financial implications, but allows us to know our finances better. We can now look at a clean copy of the historical
financial data. This cleanup is still in progress. In addition, thanks to the work of Nancy Simpson-Banker, we closed the Fourth Century Funds, collecting on the final pledges and writing off some others. We also reconciled some mis-categorized funds as well. Erik stopped to congratulate the congregation on that successful capital campaign.

Year to date (and recognizing we are 10.5 month into the fiscal year), we still need to collect $88k in income from pledge commitments to make our income forecast. This will give us 97% of all pledge commitments, allowing for a budgeted 3% falloff. If we receive that we will be $25k over budget, because the Auction brought in $5k more than budgeted and our rent is exceeding budget due to an escalation clause in the ballet contract.

Expenses are projected to be $18k under target. We have a huge overrun on the building by about $15k, partly due to electricity but also about landscaping and elevator inspection fine of $2,500. Other areas are under budget, including LRE, Ministry, and Office. If everything comes in as it should, we may have as much as a $44k surplus, not counting a $10k surplus from the Auction that we are reserving to be applied to FY17. Erik stressed that this is preliminary and many committees may spend their budgets at the end of the year.

Erik opened up questions about this current year’s finances.

- Bruce Barnett asked whether it is realistic to collect the remaining pledges. Erik isn’t sure, but acknowledged we are behind in collections compared to last year. A reminder went out last month with the Warrant, which often stimulates collections.
- Kim Lorimer asked if this is related to the 14-month year last year. Erik said no—last year was a 12 month year so it is an apples to apples comparison.
- Bob DeNoble asked what is the amount of outstanding pledges? Erik said that amount is $98k and we have collected $230k so far. But we budget for a 3% falloff from the total.
- Phil Lynes asked whether the assumption of 97% was too conservative or aggressive. Erik showed historical trends, but admits that it is a guess based on folks moving away or changing the financial circumstances during the year.
- Clark Taylor asked that the money we pay out to the UUA and the plate be included in a separate line item in budget. He emphasized that the church should know how much we spend for others, rather than just paying our own bills and programming. A separate line item can serve as a benchmark to improve over time. Erik said that this could be calculated, but it isn’t a direct line item. He described some efforts toward that goal: how we are “splitting the plate” during our offerings this year. As we had hoped, our total collections are about the same to First Parish this year ($11k to us and $11k to donations) compared to last year when we didn’t share the plate ($12k to us). Thus, we have increased our external giving. Clark urges us to give more and have a line-item toward external donations; Social Action only has a budget of about $1500.

For the next fiscal year, Erik highlighted a few changes. We plan on increase in income from pledges, rent, and plate increases. On the expense side, the Stewardship Committee made increases staff salaries the focus of the Annual Budget Drive, asking members to “leap” forward by $366 ($1 for each day of the leap year). Erik stressed that we will also have more realistic goal in maintenance expenses. We will also initiate a “capital purchases” line item, allowing us to plan for more expensive capital items like computers, new pews, carpet, speakers, etc. Currently, it is projected to be only minimally funded at $2,000. The planned budget also has a new line-item to hire a part-time bookkeeper, on the order of 2-4 hours per week. Erik noted that the planned budget includes $10k from this past year’s (very successful) Auction—but this means that the budget is purposefully unbalance for the fiscal year with yearly expenses
being $10k more than the planned yearly income. Finally, Erik also wants to have the budget in an easily-accessible place like Realm.

Erik then discussed how increases in income were allocated to the staff compensation. As a Mid-sized II church in Geo Index 5 (with between 250-349 members), Mark, Irina, and Kate were all below the minimum recommended salary. Although we are near the bottom of the membership scale for that size church, we moved everyone to just below the halfway point between the minimum and midpoint of that range. This represents about $14k in new compensation and benefits.

Erik then opened the meeting up to questions.

- Kay Taylor asked how many members made the leap to increase their pledge. Darren Zinner, representing the Stewardship Committee, responded that 57 out of 135 pledge units increased by at least $366.
- Bruce Barnett asked whether we could count on the donations to truly be recognized. Katie Barnett, representing Stewardship, responded (without any marital sarcasm) that these are contributions from donor-advised funds and we are very confident to receive them.
- Another congregant asked whether the capital budget is funded appropriately and whether there are items currently in operating that should be included in that. Erik believes that it is low, but reflects the stresses in the conflicting budget demands. This line item might be funded at $5-6k in the future and it may be reflected in lower operating budget.
- Phil Lynes wants to make sure we are also paying visiting ministers at fair compensations as well.
- Jim Sargent asked about a new line-item, Bank and Credit Fees. Erik said that this is not new, but we are tracking it separately for next year.
- Clark asked if we have any money invested in fossil fuels? Rev. Catie said our endowment is invested in UUA common fund, which is in the process of divesting in fossil fuels. She emphasized that this is a complicated process.
- Bruce asked whether we could get enough value in just hiring a bookkeeping for only 2-4 hours/week? Erik believes yes, both in the bookkeeping services and also gaining that amount of time for Susanna to do other items. Rev. Catie met with Phil Murray (Trustees) and they believe a trained accountant could do that work in about 3/hr a week at about $19-20/hr, while it takes twice that amount of time for Susanna to do it.
- Amy Cicala asked whether we can find someone for that salary rate. Erik hopes so, but anything more than zero is a net benefit to the congregation.
- Shirley Pratt asked when individuals in the congregation contribute to UUA, does it count toward First Parish Needham’s UUA dues? Erik says no – direct contributions do not factor into the approximately $20k we give toward them.

Erik finished with a discussion of our current bank balances that is available for contingencies, reassuring the congregation that we can sustain several months of expenses in an emergency. A motion was made to accept the budget, which was duly seconded. The motion passed without dissent.

**ARTICLE V: To hear the reports from the Social Action Committee on Immigration:**

Will Rico and Sisi Goneconto presented their ideas toward a new social action project regarding an immigrant ministry at First Parish Needham. Will and four other members of First Parish Needham are members of Needham Area Immigration Justice Task Force. A year ago, Will visited a prison in Karnes, Texas for illegal immigrant families. Many families have fled gang violence in Central America and have ended up in a Texas detention jail for nearly a year. Sisi talked about her volunteer roles helping immigrants in Needham, especially after the anti-immigrant rhetoric post-9/11. They both commented that in today’s headlines, too many stories about immigrants are framed by hatred.
What can First Parish Needham do? Many immigrant families are struggling here in Massachusetts. The task force is putting together a plan to help asylum seekers (mainly from Central American) and refugees (from Syria and elsewhere in the world) who come to Massachusetts. These are some of things that an Immigrant Ministry could help with, including gathering clothes or household items, driving someone to a pharmacy, helping a family enroll children in school, connecting with job or housing opportunities, or just being a friend. An active immigrant ministry at First Parish Needham can help lighten the load of our asylum seekers, refugees and new immigrant in Needham. We can actively fund raise to support a case worker for asylum seekers, run clothing and household drives for refugee families, and actively assist new immigrants by being available to answer questions and help them adjust to life here in our hometown.

In addition to connecting with immigrants, an immigrant ministry would help us connect with national UUA efforts and other local UU churches, including Arlington Street Church in Boston, First Church in Belmont, First Parish in Cambridge, First Parish in Bedford, and First Parish in Weston. He emphasized that these efforts speak to the inherent worth and dignity of every person. We should extend this belief to a community that is desperately in need of it.

Will and Sisi hope that the congregation will embrace our mission and believe that this ministry is in line with our UU goals for social justice. They ask for congregants to be part of the village to welcome and embrace new Americans.

**ARTICLE VI: To conduct such further business as is necessary.**

Liz Rover-Bailey, on behalf of the Worship Committee, sought feedback on themed-based ministry this past year. She passed out survey forms and pencils for a quick, twenty-second survey.

The Bell Awards were given:

1. Don Leathe presented an award to Phil Murray.
2. Janet Klein presented an award to Carolyn Lynes.
3. Darren Zinner presented a bell award to Bruce Barnett.
4. Erik Bailey presented a bell award to the Lorimer family.

There was no further business.

A motion was made to adjourn, duly seconded and unanimously approved, and the meeting was adjourned at 9:08 PM.
RITES OF PASSAGE

NEW MEMBERS

Abigail “Abby” Lorimier  Daniel “Dan” Kilburn  Betty Aponte
Emma Needham  Regan Bergmark  Anne Foss Innis
Cassandra “Cassie” Bailey  Brian Bergmark  Brooke M. Reilly
Gwendolyn “Gwen” Mecsas  Jan Galkowski  Timothy “Tim” Reilly
Erin Gilmore  Claire Galkowski

With these new members we also welcomed many children. Total membership as of 2/1/17: 279

DEATHS

Patrick “Pat” Brady  Helen Hicks  Mary Bradley
Elisabeth “Betty” Byers  Joseph “Joe” Powers  Arthur “Art” Foster
Jane Talbot

This year, we also mourned with many First Parish families at the loss of their close family members and friends.

MARRIAGES

Rose Siersdale & Avraham “Avi” Ribinsky
Keary Sibo & Luke Anderson

Rev. Catie also officiated the wedding of two friends in July 2016 and co-officiated the wedding of two friends in November 2016. We were overjoyed to celebrate the wedding of our music director Irina Georgieva to Navid Tehrani in March 2017. We celebrate with our First Parish members and friends whose children and grandchildren have gotten married this year.

BIRTHS AND DEDICATIONS

Teresa “Tess” Rico
Rafferty “Raffie” Sklarwitz

We celebrate with our many First Parish members and friends who have welcomed grandchildren into their lives this year.
PRESIDENT’S REPORT
by Gail Hedges

Several years ago, the Parish Committee worked to update the existing Strategic Plan. The Vision and Mission were revised lightly to reflect First Parish’s progress in achieving the previously established goals and its plans for the future. The current Vision and Mission statements are included each week in the Order of Service as a reminder of who we are as a congregation and as individuals and what we hope for the future.

After establishing the Vision and Mission statements, the Parish Committee developed four goals to support the statements:

1. **Grow** with an eye to diversity and retaining and developing our current members while appealing to those who are not fully represented in our church community through worship, music, and programming.
2. **Attain financial stability** by cultivating a culture of abundance and generosity so we can support our dreams.
3. **Make social justice** central to our identity, activities, and programs.
4. **Expand multi-generational activities** to engage in fellowship, spiritual growth, and service for our children, youth, adults, and elders.

The first goal, Growth, included a caveat: “We will have to be flexible about dealing with the size of the Sanctuary which is already often too crowded to be fully welcoming to newcomers.”

So, where do we stand in achieving these goals? How have we worked toward them?

**Goal 1, Growth:** After many discussions, Parish Committee established the Making Room Task Force. This group weighed many options even as we took a first step by encouraging worship attendees to “skootch in” to the center of the pews so later arrivals could easily find seats. The Making Room Task Force explored many options with the congregation’s input and, in its final report, endorsed refurbishing the balcony and the establishment of a trial Worship Café in Parish Hall where the Sunday service would be “piped in” live. We will be piloting the Café in the fall of 2017.

**Goal 2, Financial stability:** Of course, this is an ongoing goal. We have consciously tried to overcome our New England reticence about talking frankly about money. Our Stewardship Team has emphasized the importance of thoughtful, generous gifts from all parishioners. Our 2015–2016 pledge drive yielded pledges that allowed us to increase the salaries of our dedicated staff, bringing them closer to the pay guidelines recommended by the UUA. The opportunity to benefit from the UUA’s Legacy Gift Challenge allows us to dream of increasing our modest endowment and shoring up our financial future. A group of members led by Nancy Simpson Banker will support and encourage planned giving to the endowment.

**Goal 3, Social Justice:** Subgoals under this umbrella include ongoing work to balance activities of charity with activities focused on systemic change, to integrate social action groups and participants to support one church-wide social and environmental justice movement, and to partner with social action groups outside First Parish (other faith communities, local and regional secular groups working for social justice). The Green Congregation and the Racial Justice Task Force have sponsored speakers and workshops, and reminded us of ways (both simple and complex) to support their goals. The Immigration Task Force leads the way in understanding the complicated issues and in supporting this suddenly more vulnerable population.

**Goal 4, Multi-generational opportunities:** Embracing and integrating the wide range of generations has long been a First Parish goal. An informal survey of committees and interest groups revealed that we have a way to go on this goal. The Parish Committee and Rev. Catie will be reconvening a Multigen Task Force to explore new ways to encourage and provide more multi-generational opportunities. We’re looking forward to its suggestions.

We are a busy and committed congregation. We have made strides. We continue in our commitment to these four goals even as we know that new issues and concerns will arise.

Gail Hedges, President
MINISTER’S REPORT
by Rev. Catie Scudera

I know this has been a trying year for many because of the present political situation in the United States. We are afraid of what we see beyond our sanctuary walls: rising rhetoric and incidents of xenophobia, anti-Semitism, ableism, sexism, racism, Islamophobia, homophobia, and uncivil partisanship, not to mention the continuation of state violence abroad and here at home and of classist policies that further enrich the rich and impoverish the poor. And, we fear what impact this rhetoric, these incidents, and those foreign and domestic policies will have on those within our faith community and around the world.

But, we do not let fear guide us—as the popular hymn goes, we ask love to guide us “through the hard night.” We choose to take care of ourselves through individual spiritual practice and communal encouragement of one another, and we choose to leverage our relative powers and privileges to protect our vulnerable neighbors and advocate for social and environmental justice. Yes, in some ways, so much has changed since the fall of 2016, yet, so much has stayed the same in terms of our values, priorities, and commitments. I am now gladder than ever that we discerned four thoughtful congregational goals to achieve by the year 2020: growing our membership, securing our long-term financial stability, making social and environmental justice more central to our collective identity, and deepening our opportunities for multigenerational fellowship and learning.

As reported in many media outlets, attendance at progressive congregations has increased notably since the presidential election and inauguration. Many new people have come through our own Great Doors as First Parish is known as a loving, diverse, and justice-oriented faith community that encourages spiritual growth, ethical inquiry, and personal and communal efforts to put our values into day-to-day actions. We must make room to allow our membership to grow. I am grateful to regional UUA consultant Hilary Allen for working with our staff, our Parish Committee, and a wide network of lay leaders in our congregation to prepare us for reflection and conversation on how we can make room. And, I am grateful to the lay leaders who undertook the project of surveying church members and researching best practices about making room: Eliot Jekowsky (Parish Committee), Darren Zinner (Committee on Ministry), Jim Leffingwell (Worship), Amy Brown (RE), Ross Donald (Music), and Kay Taylor (Membership). Their engagement with the whole congregation leading up to our Special Congregational Meeting in February was exemplary, and their recommendations were clear and actionable. At the time of writing, the Parish Committee is bringing together a new small Working Group to make a Worship Café (one of the Making Room Task Force’s three recommendations) a reality in early Fall. Parish Committee secured a $2,500 grant from the UU Mass Bay District’s Woburn Fund to help us upgrade our sound systems and purchase new necessary equipment. Our resident “tech guy” Tom Gehman will lead the effort to make live-streaming to Parish Hall an excellent worship option. Parish and Property Committees will partner soon to investigate refurbishing our organ loft/balcony, also recommended by the Making Room Task Force.

We know faith communities like ours are essential for spiritual sustenance and organized resistance to governments that won’t take care of at-risk residents, and we want to be sure our congregation is financially stable enough to weather whatever might be coming on the horizon. In February of this year, our congregation contracted with a local bookkeeper after months of volunteer effort from Phil Murray to professionalize our financial records. Not only is our new bookkeeper, Jenny Conley, very talented and efficient in her work, she is saving Susanna hours of work each week—hours Susanna can now direct toward her many other administrative tasks. With assistance from Rev. Laura Randall at the UUA, Nancy Simpson-Banker and a great team of lay leaders will kick off a Legacy Giving program in the Fall. It’s clear that one of the best ways to grow our endowment is to explicitly ask for our members and friends to remember First Parish in their estate planning. With a larger endowment, we could more easily afford the basics of “keeping the lights and heat on” and, through
special restricted funds, more easily pay for professional guest musicians and compensate future student ministers and youth advisors. I greatly appreciate Nancy for her leadership in developing this new Legacy program that will be so beneficial to our congregation in the long-term. At the time of writing, it appears we may have $10,000 more in our 2017-2018 budget, at least half of which represents pledges from new members. From 2014 to today, we have upped our total budget about $50,000. After years of severely underpaying staff, we are nearing our goal of fairly compensating our religious professionals. We still dream of a future where our programming and activism is more robustly funded. It seems we are bumping up against how far our already-generous current membership can stretch to financially support the church. One more reason to make more room!

We make a big, positive impact in the wider community when First Parisioners are engaged in works of charity and justice. Our social and environmental justice programming has thrived this year, and here’s a sampling: our Social Action Committee has been very responsive to renewed human rights concerns, such as writing supportive letters to local mosques and synagogues and partnering with our Immigrant Ministry team to investigate the new sanctuary movement; Green Congregations’ has sponsored “Commit2Respond” actions throughout the year, brought together many people in MetroWest for the *Time to Choose* film showing and eco-justice networking event, and with Social Action partnered with UU climate activist Evan Seitz and other local UUs against the West Roxbury pipeline; our Welcoming Congregations team has kept us updated about trans accommodations protections and advocacy; our Racial Justice Task Force sponsored multiple events leading up to the *Icons of the Civil Rights* art and film exhibition (including a showing of 13th, workshops from UU anti-racism leaders Kenny Wiley and Ken Wagner, and Lyceums from the UU Urban Ministry and Louis D. Brown Peace Institute); and, we started a new anti-human trafficking group, Needham PATH. Many of our members and friends have participated in national marches for social and environmental justice, including the massive Women’s March and the March for Science, Climate March, and Mother’s Day Walk for Peace. I also appreciated the Parish Committee’s blessing when the women religious professionals at First Parish stayed home from work for the #DayWithoutAWoman strike. I’ll note that this year, particularly since the election, I have felt a real tension between my role as First Parish minister and (small-p) parish minister — how do I make time for groups like the Witness for Justice Coalition (whose Empowerment Fair we hosted in January) and interfaith efforts like the new sanctuary movement when there is so much that needs my attention at First Parish itself? There is no immediate answer to this question, but it is a tension I am mindful of.

We recognize that we have an imperfect understanding of systems of oppression and how we contribute to them, and so we are committed to lifelong ethical and spiritual growth in our community. We have made the least amount of progress on our fourth and final goal of more multigenerational fellowship and learning opportunities. The third and final recommendation from Making Room was to reconvene a Multigenerational Task Force to reassess the original Multigen Task Force’s goals and implementation of their proposals. The Parish Committee and I hope to bring a group together to do just this after we’ve launched the Worship Café experiment.

However, our already stellar religious exploration programming continues and improves despite not having a Continuing Education Committee this year, as noted in Mark’s report and the reports from RE and YAC. We are especially appreciative of Marguerite Robbins’s leadership in arranging for the *Icons* exhibition to visit our congregation. Though the work has been slow-going, my collegial partner, Rev. Mary Helen Gunn, and I have moved forward with beginning a UU campus ministry at Olin College through connecting with Olin administration. Our hope is to begin weekly meetings on campus in the near future. Noting small numbers on the RE Committee, the difficult restart to Continuing Ed, and Mark’s upcoming sabbatical in spring 2018, RE leadership has engaged in such introspective questions and conversation as: Who is responsible for the implementation and sustainability of congregational programs? How do we invite, give, and process feedback in
healthy ways that improve relationships as we improve our church? How do we make room for church programming and communication in a hyper-busy cultural lifestyle these days?

A few final notes before I “sign off” for the year:

Mark, Irina, and I organized a few special worship services last fall: a blessing of the backpacks ceremony, a service honoring the fifteenth anniversary of 9/11, a real blessing of the animals, and a vigil the evening after the election. One thing we’ve learned is not to schedule anything concurrent with a Patriots game!

I appreciate the efforts of Jessie Bowen, Susan Camuti, and Phil Lynes for their special work in getting all our new hymnals (including a new braille one) ready for use in worship.

Continuing the work of Rev. Katie Lee Crane, past Interim Minister, our whole staff has participated in stronger supervision practices this year, including mid-year and final evaluations for all eight of us on staff. I’ve also worked with three of our staff members to either update or create job descriptions for their positions. Did you know neither of our music director positions had job descriptions? They will soon! Francis has been an excellent addition to the staff team, and I look forward to the fruits of our youth program coordinator search that is happening at the time I write. It has been great having Jenny Conley working on contract as our new bookkeeper.

Our Safe Congregations Task Force is moving along, and most publicly led another emergency drill and a training session for “emergency marshals” this year. Piece by piece, we are headed toward a greatly improved Safe Congregations policy and procedure manual. In a similar vein, Parish Committee called a Special Congregational Meeting in February to update and improve our bylaws.

One congregational system we have not yet updated and improved is how we nominate members and friends to non-elected positions on standing committees. In “the old days,” the minister would be the primary nominator of the church, pairing individuals to committees and programs that need their skills or match their interests; this becomes an increasingly difficult task for a single person as our congregation grows. The Nominating Committee (despite it not being their charge), the Program Council, and the “Tending the Flock” team have done a great job “matching” new folks and committees despite there being no official process, and Membership plans to create an all-congregation database of skills and interests in the coming months. But, nominating procedures should be a focus in the near future as we strive to pass our current membership ceiling of around 275 members.

In consultation with my UUA mentor and the Committee on Ministry, I’ve participated in two professional development opportunities this year: a time management course through Brookline adult education (my tardiness has plummeted this year as a result—excepting occasional dog-related surprises) and an online non-violent/compassionate communication course through the UU Institute. I continue to regularly attend quarterly local UU ministerial gatherings, quarterly UU ministers’ Bible study, and a twice-a-year UU ministerial study group. I continue to serve on the UU Partner Church Council as a Board member, as well. I offered the “right hand of fellowship” to my friend and colleague Rev. Sean Neil Barron in early April. In May, I will also attend an interfaith clergy retreat in Rhode Island just days before our Annual Meeting and, in June, the national UU collegial Ministry Days and then General Assembly, when we will elect a new UUA denominational president.

I have continued with local interfaith work this year. I participated in: the grand reopening of Temple Beth Shalom after their “year in exile”; the annual interfaith Thanksgiving worship; a World AIDS Day movie and worship at the Congregational Church; the town’s annual Martin Luther King Day celebration; an interfaith/intergenerational book read of the graphic novel March with the Baptist and Congregational churches; ecumenical Holy Week services; and a dinner and dialogue about racism at the Presbyterian Church.
I will have the whole community in my heart while I’m away from the church this summer, studying and renewing myself for our big and experimental 2017-2018 year. I’ll spend my study leave weeks around New England and Metro D.C. My spouse and I are celebrating our fifth wedding anniversary with a long trip to Europe, including returning to Croatia where we became engaged, Greece where we spent our honeymoon, and visiting my (grand)fatherlands of northern Portugal and Sicily. I return to First Parish fulltime on August 21st, looking forward to seeing you September 10th at Ingathering Sunday for water communion.

Blessings,

Catie Scudera

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**DIRECTOR OF LIFESPAN RELIGIOUS EDUCATION’S REPORT**

**By Mark E. LaPointe**

Moving toward the end of my sixth year with First Parish in Needham, I’m proud to be a part of so much growth and so much potential, within various Religious Exploration programs, and in the church as a whole. Religious Exploration for children, youth and adults is the largest program area at First Parish, requiring upwards of 80 people working to help us all seek truth wherever we are on our life’s journey. While there are far too many to thank here, I do want to give a shout out to some of our volunteers.

This includes the very small RE Committee of Jen Packard (chair), Jodi Rooney, Dana Robinson and Melanie Guarrera, Darren Zinner and Ann O’Keefe who are working with me on the new Coming of Age course; Kate Fitzgerald who is tackling the disorder of the RE Closet; Carolyn and Phil Lynes, and Marianne McGowan who helped chaperone the annual Youth Group trip; and the Social Justice Committee and the Racial Justice Task Force who provided much adult programming this year. There are many, many more of you who deserve to be acknowledged and appreciated and I hope you know how grateful we all are.

We must note that one critical volunteer is transitioning away from a key role she’s played this year and I hope you’ll all join me in thanking her for her tremendous gifts of time, energy, creativity and love. Priscilla Mullin has been our Youth Group lay leader for several years now and has been a tireless advocate for the youth of our church. Among the many ways in which she’s put her own energy into the Youth Group, Priscilla is the chief architect and promoter of our monthly Soup Sundays, our most successful ongoing fundraiser in years.

Collaboration and cooperation have been key themes this year as we faced some challenges and many successes. Let me share a few highlights from the year and reflect on the direction of our RE program going forward.

**Children’s RE (Way Cool Sunday School)**

Enrollment and participation in the RE program is steady and we are seeing a healthy number of children in our PS-8th grade program. Most of our Sunday classes use the UUA’s Tapestry of Faith curriculum which fits our model of learning well. The RE Program and the guidelines set out by the congregation work in concert with one another and we regularly work to integrate things like worship themes and social justice priorities into the children’s program.

We’ve begun the multi-year rollout of our new middle years curriculum, moving Neighboring Faiths to the seventh grade, adding in a one year focus on “big questions” for sixth grade and working toward a full year Coming of Age program in the ninth grade year which will launch in the fall. Yes, that means there will be no COA service this spring. We are also going to slowly introduce the Spirit Play program for Preschool through
First Graders. It is like the Montessori style of learning and will use play and storytelling as key components. It also allows us to reduce our overall volunteer needs each year as recruitment can be a challenge.

Thanks to the work of Jen Duhamel and some volunteers, we’ve also returned to a nice full schedule of Children’s Worship Sundays. Jen builds lessons plans for a “one room schoolhouse” model that provides spiritual opportunities for younger children primarily during long holiday weekends when attendance is predictably low. These programs are connected explicitly to the worship themes and our 7 Principles.

Youth Programming
Our youth programming begins at 6th grade and includes four years of regular RE classes as well as junior and senior youth groups. Junior Youth Group meets bi-monthly and is for junior high youth, Senior Youth Group meets at least three times per month and is open to all senior high youth. About 20 youth participate in one of these two groups.

The Youth Groups have both been quite successful this year with Kate Loftus Campe taking on the role of interim Youth Program Coordinator. Kate has a great rapport with the group and has been an excellent mentor, planner and guide for the young people of our church. She’s done a very good job of balancing her multiple First Parish hats along with her outside professional life, studies and personal life.

This year’s Youth Group service was more local than in past years with the Youth going to Thompson’s Island for a few days and then to Nashua, New Hampshire for a second segment. The unusual schedule was designed to offer shorter trips so that students in private schools (who don’t have the same break schedule) could participate in some fashion. By all accounts our youth did much great service work and represented the church well.

Adult Exploration
Our Adult RE programming (Continuing Education) is thriving at First Parish in spite the lack of an active committee. This can be attributed to the wonderful work of many people who have lead programs and hosted speakers. We are in the process of finally assembling an Adult RE Committee so that we’ll hit the fall with some programming already planned. I personally will also continue the work I’ve been doing on creating stronger communication and connectivity among all of our adult programming opportunities. Let me know if you’re interested in serving in this important role.

Professional Notes/Administration
As many of you know, I suffered a prolonged illness last fall that slowed down my work tremendously. While I continued to work from home and Jen Duhamel and Amy Brown both stepped up a bit, this illness did underscore a need to have stronger plans in place to manage this large program should I be unavailable for any length of time. This will be particularly important when I take a three-month sabbatical next spring to work on the Lessons of Loss curriculum. You can read more about this in an upcoming blog post, but many of you will the sabbaticals of Reverend Beuhrens and my predecessor Irene Praeger.

I am actively involved in professional development and leadership within the broader community of Unitarian Universalist educators. I am the President of the New England chapter of the Liberal Religious Educators Association (LREDA) and represent our region at the national and local levels. This Fall I attended my profession’s annual meeting in San Diego where our focus was on dealing with difficult topics like race, violence and abuse. I have also participated in continuing education programs through the UUA and am gearing up for a May course in Autism.

Within the church, I am an active contributor to many programs and interface with the Religious Exploration Committee, the Youth Adult Committee, the Social Justice Committee and Worship. I work with the staff team to
implement worship each Sunday often delivering part of the worship service, at other times writing and preparing materials that others deliver.

The Near Future of RE
We will continue to undergo our changes and expansion in programming and we’ll have stronger efforts to communicate well and to see the ways in which RE is connected across ages and interests. In the fall we will reintroduce the Parent Newsletter and we will expand our search for volunteers to take on more discreet projects especially around administration.

It is important to know that our enrollment in children’s RE is likely to look lower in the next few years. This reflects the demographics of our current participants where the later classes are significantly larger than the earlier ones. The new worship café and other efforts to grow the church will help with this, but many people bring their children to Sunday School only when those children are a bit older.

In peace,
Mark

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MUSIC DIRECTOR’S REPORT
By Irina Georgieva

SongSquad and UURingers
The young musicians from Song Squad and UURingers continue to bring joy and lightness to the First Parish Sunday morning services. Their repertoire this year included Left-Right by Joanne Hammil, This Little light of mine, Going Us a Yonder, and Dona Nobis Pacem (Song Squad); America the Beautiful, Thriller, Counting Starts-One Republic (UURingers). Both groups were actively involved in the annual Festival of Lights during which they performed pieces from several religious traditions.

Kate Loftus Campe
Kate has been wearing many hats this year. She is temporarily taking the role of Youth Program Coordinator. In addition to leading First Parish Young musicians in rehearsal and service she also sang solos on a couple of occasions. She also played chimes during the Musical Meditation portion of several services.

First Parish Singers and First Parish Band
First Parish Singers and First Parish Band opened the church year on Ingathering Sunday with Homecoming, and Let’s Get Together by Chet Powers. Under the direction of Jim Sargent, the two groups have done an amazing job matching the themes of their music with the monthly and weekly themes of the services. Their presence in the worship services remains very special for the First Parish Congregation as they offer a wide variety of styles and genres. Both groups’ members are deeply devoted to offering their musical gift to First Parish. Their repertoire this year included: Water from Another Time by John McCutcheon (Water Communion), October Roses by Linda Allen (performed in October), Brother, Can You Spare a Dime, by Yip Harburg and Jay Gorney, and Nobody Knows You When You’re Down and Out by Jimmie Cox, during November when the theme was Abundance and Stewardship.

Betty’s Singers
The newly formed Betty’s Singers is a vocal formation, which has a very special role: to visit the ill and the dying and comfort them by singing. The group’s membership has grown rapidly and their current number is around a
dozen. While the group membership is not limited to First Parish volunteer musicians, many of the current members belong to First Parish Singers and/or First Parish Choir.

**First Parish Choir**

First Parish Choir has continued to grow. We started the church year by experimenting with a new rehearsal time: early Sunday morning instead of the traditional Thursday night, which has helped attract new members. This year the choir has been more active during worship compared to last year and two years ago. The choir sings almost every week and usually more than one piece per service. Singing together frequently has helped the group develop a better blend and a more confident presence during worship services.

**Volunteer Guest Musicians**

A large number of First Parish volunteering musicians have taken part in Sunday worship. Jessie Bowen (tenor recorder) played *There is a Balm in Gilead*. Eliot Jekowsky played an arrangement of *Here We Have Gathered* (flute), *Hine Ma Tov* and *Yossel Yossel* (saxophone). Wendy and Dave Blom, and Jim Sargent presented *Flatbush Waltz*. Cassie Bailey (flute) played movements from Francis Poulenc, *Sonata* and a number of carols for the Christmas Eve service. Bob Jorgensen (saxophone) played *Intrada* by Thomas Schudel, and *Album Leaf* by Edward Grieg. Eliot Jekowsky and Dave Blom performed *Yiddish Lullaby* for Purim. Wendy and Dave Blom, Eliot Jekowsky, and Ross Donald presented *In a Sentimental Mood* by Duke Ellington.

**Professional Guest Musicians**

During 2016-2017 First Parish hosted a large number of professional musicians: Antonio Espinosa (guitar and conductor), Justin Lundberg (tenor and piano), Janelle Hollister (soprano), Jacqueline Schwab (piano), Andrew Harms (trumpet), Christon Carney (tenor), Vance Gilbert (singer/songwriter), Mina Lavcheva (violin), Olga Bean (violin), Noriko Futahami Herndon (viola), and Nara Shahbazyan (cello).

**Organ Music**

Organ music is occasionally heard during worship. In addition to hymns, some of the composers represented during 2016-2017 have been Adolph Friedrich Hasse, Johann Sebastian Bach, Dietrich Buxtehude, Johann Georg Herzog, Paul Vidal, and Felix Mendelssohn.

**April through June**

During the last couple of months of the church year there will be a number of musically special services: On April 30, our own Bob Jorgensen is coming back with the rest of his saxophone quartet to play for a service focused on the Civil Rights Movement. May 7 is Music Sunday. This year we are hosting Nick Page who will use “Music is a Verb” theme and will teach the choir and the First Parish Congregation several of his songs. On May 28 Jacqueline Schwab (piano) is coming back to present her stunning improvisations on familiar folk and gospel tunes and hymns.
This year significant improvements have been made in staffing various functions more fully, and also in technology and building systems.

Goals for this year were:

- Search for and contract new bookkeeper, completed.
- Reassess job description and responsibilities with bookkeeping and some facilities upkeep taken on by new contractors and staff members, completed.
- Implement review process for sexton and cleaner, completed.
- Work with lay members on congregational record-keeping and transparency, including creation of an accessible policy and procedures manual, this will be a goal for the coming year.
- Supporting Property Committee project goals in coordination with sexton and cleaner, completed.

Financial Possibly the biggest new development in the office this year, both for the congregation and for the Parish Administrator, is the hiring of Jenny Conley our Bookkeeper working on contract, rather than as a staff member. Jenny began in late February. Susanna is not a trained bookkeeper nor an accountant and Jenny’s expertise is an important new benefit for the congregation. Many thanks are due to Phil Murray (also currently Trustee of Invested Funds) and to Don Leathe (past Vice Chair of the Parish Committee) who have accounting expertise and were able to upgrade the entries in QuickBooks in preparation for Jenny’s arrival. Susanna worked with Rev. Catie, Don Leathe, Phil Murray, and Erik Bailey, Treasurer to ensure readiness for Jenny.

Jenny has been working with us for nearly two months at the time of writing. Her work is excellent and quick enabling Susanna to focus on other work, no longer on entering income and writing checks. The Parish Administrator will still always need to prepare invoices and statements for entry to ensure accuracy. There is a necessary, continuing yet reduced role for the Parish Administrator in financial work. The Treasurer continues to oversee all transactions.

The volunteer role of Collector is to account for all income by check and cash, and to make the bank deposits. Our two faithful collectors are Bette Vogel and Amy Brown, who cover different portions of the year. This process is detailed in our new document that describes the interactions, roles, and responsibilities of everyone who works with church finances. The process in brief is that ushers count the collection, the Parish Administrator counts it again and notes amounts split with organizations the Social Action Committee has selected. The Parish Administrator also receives all payments by cash or check during the week. The Sunday collection and weekly income received is entered in Realm by the Collector, which enables giving statements to be produced. The Collector deposits the money in the bank. Our bookkeeper enters these amounts in QuickBooks, the accounting program that tracks the income and expenses of First Parish. On a monthly basis, the Bookkeeper also enters payroll and reconciles the account using our bank statements. Weekly or biweekly the bookkeeper cuts checks.

In 2014 we established the practice of sending out giving statements (pledge statements) three times a year, in October, January, and April, the latter coinciding with mailing the warrant for the annual meeting. This year, as we had an additional congregational meeting in February 2017, to decide on bylaws amendments and to hear a report from the Making Room Task Force, there was an additional warrant sent, this time with the January giving statement mailing. Many thanks to Gail Hedges, Katie Edwards & Kathi Cotte for their assistance in collating all of these statement and warrant mailings.
**Staffing, Building & Rentals** In Summer of 2016, after Michael Caramanica, our previous Sexton, left for another job, a search committee was formed of Mary Ann Oldfield and Eleanor Rosellini, members of the Property Committee, and the Parish Administrator. Frederick Francis was hired. He is known to us as Francis, at his insistence, as Freddy Soto is on staff and Francis wished to avoid name confusion. The Property Committee chose to change the Sexton position, focusing more on building repairs and less on cleaning, in order to complete the existing work list. Francis has completed all remaining projects listed left over from 2015-16, and that arose in 2016-17. He solves problems promptly, and identifies potential problems before they arise. His diligence, thoughtfulness, and vigilance is an enormous asset to First Parish.

Freddy continues deep cleaning, also does special floor buffing and carpet cleaning saving us considerably over previous contractor costs. He keeps our building in far better shape than we were previously accustomed.

In Summer of 2016, the Property Committee arranged for a new floor to be installed in the Nursery and the Youth Room. Gone are the days of the previously pitted Youth Room floor. In Autumn, the elevator decided to act up nearly every week, which took a lot of time and attention to manage, trying to keep costs down while providing service. At last after a new motor and other repairs it has resumed normal functioning.

The Rental Board of First Parish created wedding packages for occasions at our church. Due to the amount of work involved that the Parish Administrator would not have time for, the role of Wedding Coordinator was created. The packages are for wedding only or wedding and reception, and the same two reduced-cost packages for members. Tabby Rappolt has been engaged as our freelance Wedding Coordinator, being paid by the renters.

In Spring of 2017 a number of one-off rentals were booked, due to increased time from the bookkeeping being handled professionally. Each rental requires various arrangements, apart from the booking and coordinating of someone being present for the renters. These rentals provide a modest increase in income for First Parish.

**Technology & Communications** Our annual audit by Gray Brown highlighted a need for better computer data backup. Phil Lynes was instrumental in assisting with this and with new computer installation and networking in the office this year.

Don Leathe has taken on the ongoing role of insuring that our member list is updated with the UUA. This enables our members to receive UUWorld. He also provides significant assistance with our annual certification with the UUA, where we provide annual members, friends, attendance, and RE enrollment figures, and more. It is important that ushers count all adults and children present each week so that we can track this and report accurately annually. It throws off the accuracy of our data if we miss weeks. Attendance figures are also key for our understanding of the needs for Making Room Task Force and Worship Café.

David Mecsas, of the Communications Committee updated and supplied the *Needham Times* with Easter and Christmas services ads, liaised with our web contractor, and a myriad of other essential tasks that make the work of the office flow smoothly and make the congregation stand out proudly. David also provides support and innovation for use of Realm, as does Tony Cicala. David also coordinates a team of himself, Marianne McGowan, and David Moore to produce the weekly e-newsletter the *Bell Notes*. Additionally, he is responsible for producing *The Bellman*.

The role of Parish Administrator is reliant on volunteers fulfilling many functions. Without these folks many of the church’s needs would go unmet. Thanks to all who help First Parish to flourish!
COMMITTEE REPORTS

ARCHIVES COMMITTEE

Committee Chair: Jeanette Anderson

Committee Members: Buffy Duhig, Muriel Gehman, Shirley Pratt, Louise Talbot

Mission Statement: Our mission is to collect, maintain and safely store any materials of continuing historical interest to First Parish. Through periodic exhibits of the materials in our collection, we try to interest members in their historic past. Another of our priorities is to help the staff and committees answer questions about past events. The present committee was organized in 1998. We meet twice a month on Tuesday mornings in the Youth Room.

September, 2016—First Parish sponsored the annual Needham Historical Society Walking Tour. Committee members opened the church for interested visitors.

September 2016—Our new member Louise Talbot is a welcome addition to our committee. Her special skill, learned as a volunteer in Needham Public School Libraries, is to repair books. She was able to do a professional job mending an old Bible for the fall Bible exhibit.

September 2016—The Archives Committee participated in the Volunteer Fair, organized by the Program Council.

September 2016 to June, 2017—In addition to ongoing storage of past and present documents and activities, the Archives Committee has worked on filling the gaps in the Memorial Book, Order of Service and the Bellman. Also, we continue the entry of documents and audio visual materials into a computer file. Archival albums were purchased to organize images and pictures of the building, as well as First Parish members and activities.

October, 2015 to present—The Mary Sugars Townsend silver porringer and spoon is still on loan to the Needham Historical Society for their exhibit, ONE HUNDRED THINGS IN 100 YEARS, celebrating the 100th anniversary of the Needham Historical Society.

November 2016—On History Sunday, the Archives Committee mounted an exhibit of the old Bibles owned by First Parish. The exhibit was held in Parish Hall during coffee hour.

2016—2017—The Archives Committee worked with the Property Committee on the display of old church pictures in the main hall. We assisted the Minister, the Worship Committee and the Parish Committee in researching various dates, topics, and background material.

2016—2017—The Archives Committee is eager to help any committee if they wish to research their history at First Parish. We have annual reports, copies of the Bellman and Orders of Service, plus documents and articles for most committees.

COMMUNICATIONS COMMITTEE

Committee Chair: David Mecsas

Committee Members: Marianne McGowan, David Moore, Susanna Whitman

Mission Statement: The mission of the Communications Committee is to ensure that Parish communications meet the needs of our members and friends, staff, and visitors. To fulfill this mission, the committee oversees key print and online publications, facilitates the communications efforts of other committees, works to ensure that our information and communications infrastructure is up to the task, and coordinates special projects as needed.
Summary of Goals and Accomplishments:

Goals listed in last year's annual report.

- **Goal:** Organize a ½-day communications retreat to evaluate content and media (including the conversation about the form, frequency and timing of *The Bellman*), possibly restructure current work flows, address concerns that have been raised in various committees, and integrate Rev. Catie's vision for parish communications, possibly using a consultant.
  
  **Progress – Bellman decision:** The Summer 2017 issue will be the last *Bellman*. This is a decision we've been approaching for several years, one based on declining readership, the duplication of content on the web, Facebook, and in *Bell Notes*, the volunteer time and effort that goes into producing the *Bellman*, and the overall move toward electronic media in our culture. At its April 12 meeting, the Parish Committee endorsed the recommendation of the Communications Committee to drop the *Bellman*. Both committees recognize that some congregants will be disappointed with this decision, but ask those congregants to do their best to adapt to the *Bell Notes*, the website and Facebook as their information sources for First Parish—and to let us know when their communication needs are not being met. The Communications Committee and the Pastoral Care Associates will work together to see that shut-ins and others with no electronic access stay connected with the First Parish community.

- **Goal:** Produce a high-quality "Welcome to First Parish" video for the website.
  
  **Progress:** No progress. Will keep on list of Goals for next year.

- **Goal:** Continue on-time delivery of:
  - 50+ issues of *Bell Notes*
  - 11 issues of the *Bellman*,
  - Updates of www.uuneedham.org at least once/week
  
  **Progress:** Done. David Moore joined the team and took over production of every other week’s *Bell Notes*, while Marianne McGowan continued to produce the *Bell Notes* in alternate weeks.

- **Goal:** Continue to improve uuneedham.org, including posting of sermon PDFs.
  
  **Progress:** We have not instituted posting of PDFs. Will keep on list of Goals for next year.

- **Goal:** Continue to focus on social media by:
  - Continuing to improve our Facebook presence, specifically by maintaining a current listing of events on Facebook.
  
  - Continue developing a more robust blog, with multiple contributors, with a focus on committee contributions.
  
  **Progress:** We are posting some events on Facebook, but not in a systematic way. On the blog, we have continued to rely on voluntary contributions, and have not had set up a schedule for soliciting content from committees. Will keep on list of Goals for next year.

- **Goal:** Continue to produce and place media notices promoting FP activities and news with local, regional and UU media as appropriate.
  
  **Progress:** Some successes, other opportunities missed.

- **Goal:** Continue to work with other committees to optimize First Parish's use of the Realm database.
  
  **Progress:** Minimal progress.
Goal: Continue development of an online repository for our photo library.  
Progress: Minimal progress.

Goal: Explore wider spread adoption of Inventoried File Management.  
Progress: No progress.

Goal: Investigate online document-sharing solutions for First Parish.  
Progress: No progress.

Looking ahead — preliminary goals and issues for next year
The number of goals showing minimal or no progress over the past year suggests that some reorganization may be in order. We have also made an effort to commit ourselves to fewer goals in the list below.

Goal: Recruit new committee members in specific roles such as photo archivist, video producer, et al.

Goal: Continue on-time delivery of 50+ issues of Bell Notes and weekly updates of www.uuneedham.org.

Goal: Make any necessary adjustments to Bell Notes, the website, and Facebook to compensate for the departure of the Bellman.
- Continue to improve uuneedham.org, including:
  - Possibly modifying the home page to display the calendar more prominently
  - Posting of sermon PDFs.
  - Continue developing a more robust blog, with multiple contributors, with a focus on committee contributions.
- Continue to improve our Facebook presence, specifically by maintaining a current listing of events on Facebook and recruiting more “posters”.

Goal: Develop policies relating to the website, Facebook and other communications issues.

Goal: Continue to produce and place media notices promoting FP activities and news with local, regional and UU media as appropriate.

Goal: Continue development of an online repository for our photo library.

Other goals that may be considered, resources allowing:
- Organize a ½-day communications retreat to evaluate content and media, possibly restructure current work flows, and integrate Rev. Catie’s vision for parish communications. Possible using a consultant.
- Produce a high-quality "Welcome to First Parish" video for the website.
- Continue to work with other committees to optimize First Parish's use of the Realm database.
- Explore wider spread adoption of Inventoried File Management.
- Investigate online document-sharing solutions for First Parish.

FRIENDS OF SOCIAL HOUR

Committee Chair: Molly Kerrigan

Committee Members: Buffy Duhig, Mair Lustig, Tabby Rappolt, Eleanor Rosellini, Judy Hadrick

Mission Statement: The mission of the Friends of Social Hour is to provide the infrastructure and organizational support needed to maintain a vibrant weekly Social Hour at First Parish in Needham. Our Social Hour is a
multigenerational opportunity for socializing and community building. It is a central part of the Sunday experience for all ages.

Summary of Goals and Accomplishments:

- **Recurring Goal #1 set at beginning of year: Replicate this year’s schedule for next year as much as possible. Have most slots filled by June.**
  - We recruited and supported hosts for 41 Sundays (6 hosts each Sunday). Many of the larger committees, Small Groups, and Neighborhood groups hosted twice--once in the fall/winter and once in the winter/spring. The adult choir, Youth Group, PYC, and Homegrown Coffeehouse also hosted.
  - Filled 6 open sign-up Sundays, including Christmas Day, New Year’s Day and Easter Sunday.

- **Goal #2 set at beginning of year: Update set of kitchen guidelines and distribute to church committees/groups who reserve Parish Hall and intend to use the kitchen.**

**Goal #3 set at beginning of year: Recruit and train 3 new members for FOSH and Kitchen Crew.**
  - Judy Hadrick and Tabby Rappolt officially joined FOSH in January 2017. Molly Kerrigan was recruited to replace Eleanor in the role of Social Hour Coordinator. Eleanor met with Molly Kerrigan several times in the summer of 2016, and Molly officially began the role of Social Hour Coordinator in September 2016. Eleanor and Muriel have served as resources as needed.

- **Goal #4: Try having “light” Social Hours on quiet Sundays, such as Sundays after a Holiday, School vacation Week etc.**
  - Four “light” Social Hours (beverages and cookies were offered) were implemented with success.

- **Goal #5 Kitchen Clean Up and Reorganization**
  - A thorough cleaning and reorganization of the kitchen occurred on April 18, 2017. All team members participated.

Looking ahead — preliminary goals and issues for next year

- **Goal: Replicate this year’s schedule for next year as much as possible. Have most 2017-2018 slots filled by June, 2018.**

- **Goal: Figure out a way to allow the various Music groups can participate in Hosting Social Hour given the fact that Rehearsals limit their availability**

- **Goal: Continue to work toward engaging more members of First Parish in volunteering for Social Hour**

- **Goal: Hold FOSH/Kitchen Crew Meeting in Fall 2018 to set up monthly Kitchen Crew assignments, etc.**

- **Issues: Involving more members in hosting, rather than having the same people hosting multiple times, continues to be a struggle. Some members who are on multiple committees did more than their fair share, but generally we were able to spread the work more evenly, partly through getting the Neighborhood Groups involved (the most inclusive groups). The hybrid model of asking committees and groups to host once or twice, and having a few open sign-up Sundays, has made the task of filling all the slots less challenging.**

- **Other accomplishments**
  - FOSH members have continued to fill in on Sundays that need extra support, and continue to do an exemplary job taking on a wide variety of behind-the-scenes tasks necessary to keep Social Hour thriving and running smoothly.
Muriel Gehman has kept kitchen supplies stocked and has procured church-supplied juice, children’s snacks, and coffee cakes. FOSH met to brainstorm thoughts and concerns regarding proposed Worship Café. Muriel wrote up everyone’s contributions and Molly represented them at the Worship Café Committee Meeting 4/27/17.

GREEN CONGREGATION

Committee Chairs: Katrina Kipp and Eleanor Rosellini

Committee Members: Susan Abbott, Elinor Brady, Elise Coughlin, Linda Davis, Ross Donald, Ellen Fine, Jeff Friedman, Jan and Claire Galkowski, Tom Gehman, Jeanne Gerber, Katrina Kipp, Fred Kresse, Susan McGarvey, Marianne McGowan, Suzanne Pelton, Ed Quinlan, Jeff Rivard, Eleanor Rosellini, Mary Sprogell, Tad Staley, Bill and Carole Thomas

Mission Statement: Guided by the UU Seventh Principle, “Respect for the interdependent web of all existence of which we are a part,” the Green Congregation Committee (GCC) will strive to bring about positive environmental changes through congregational activities across all ages, personal lifestyle changes among the congregants, and involvement with the broader community. In so doing, the Committee will achieve and maintain Green Sanctuary certification under the Unitarian Universalist Association.

Summary of Goals and Accomplishments:

Goal #1 set at beginning of year: Continue our Green Sanctuary mission by planning activities in each of our four action areas: worship, religious education for all ages, sustainability, and environmental justice.

Worship:

- Sunday Welcome now includes: "We are a Green Sanctuary committed to care for the Earth and to work for eco-justice as we address the climate crisis."
- Environmental themes are included at least once a month in prayers, readings, story for all ages, or mentioned in the sermon.
- Reverend Catie often includes environmental themes in sermons and arranges for guest ministers who speak about the environment.
- September 25: Guest minister Michelle Walsh gave sermon on eco-theology. Welcome introduced Green Energy initiative, encouraging people to sign up with Mass Energy for Green Power
- March 12: Welcome encouraged people to attend climate change film Time to Choose
- March 21: Rev. Fred Small was the guest minister, giving a sermon about climate change. Green Congregation staffed an informational table about groups that he is supporting.

Education:

- September 25: Needham Lyceum, Mass Energy Green Power Program, with Loie Hayes
- September 25: Eleanor Rosellini put together a slide presentation on renewable energy (Denmark’s "Energy Island" for the Story for all Ages).
- January 29: Needham Lyceum about electric vehicles, led by Maura O’Gara, Energy Programs Coordinator for Mass Energy
- March 12: Green Congregation hosted the climate change film Time to Choose, with 12 Metrowest environmental groups co-sponsoring and staffing informational tables. 120 people attended.
- April 2: Green Congregation organized an RE session promoting vegetables and Meatless Mondays

Sustainability:

- From April 2016 through March, 2017, our solar panels produced 15,137 kilowatt hours of electricity. Since the panels were installed in March of 2013, they have produced 63,047 kWh, avoiding 92,300 pounds of CO2 and saving the church thousands of dollars on its electric bills.
For the month of October, we had a Green Power campaign, encouraging more people to sign up for Mass Energy's Green Power programs. Six new households signed up and 3 made donations to the New England Wind Fund. Since July, 2016 First Parish has received $275 from Mass Energy ($25 for each new sign-up and $25 for each household that stays in for year), plus $75 from anonymous donors ($25 for each donation to New England Wind Fund).

During the month of January, GC had several Actions of the Week, with prizes for those signing pledges about various actions to cut household carbon footprint, including traveling less, air drying laundry, reducing paper towel use.

At the March 12 showing of the climate change film *Time to Choose*, the committee invited Mass Energy to have a table explaining their electric vehicle purchasing program.

Green Congregation donated a home-made vegan meal to the Mini Auction.

On March 19, GC invited HomeWorks Energy to Social Hour to take sign-ups for Mass Save home energy assessments. In April First Parish received a check from Green Needham (partnering with Home Works) for $60 as a referral fee for 3 completed energy assessments of First Parish households.

April 2 Action of the Week, with a prize drawing, was a Meatless Monday theme, encouraging people to eat less meat. Kate Canney of the Neighborhood Farm was invited to Social Hour to take CSA signups.

GC organized the May 21 Roll and Stroll to Church event. Once again we worked with the neighborhood groups and got agreement from Continuing Ed and the music program not to have before-church events, so everyone could arrive together.

First Parish continued its leadership of the Needham Interfaith Environmental Network, which met November 2, 2016 to share ideas.

**Environmental Justice:**

- Several GC members marched in Boston for the September 12 Moral Monday National Day of Action, calling for protection of the most vulnerable and marginalized in our society and a safe and healthy environment.
- Several members participated in the Women’s March in Boston and in DC on January 21, 2017.
- GC publicized within the church the April 22 Boston March for Science rally and several members attended.
- Several members participated in the Climate March in Boston and in DC on April 29, 2017.
- First Parish continued to support the Needham Community Farm's efforts to grow food for the Needham Food Pantry and to offer free gardening education to low income families. Plate collections during the month of April were split with the Farm and the annual farm work day was on May 6.
- Because of its work with MAICCA (Mass. Interfaith Coalition for Climate Action), First Parish was invited to send a delegation to the Boston Climate Justice Simulation on May 6 and May 7th. Six people from Green Congregation, Social Action, and Racial Justice Task Force attended.

**Goal #2 set at beginning of year:** Follow up on our Green Sanctuary obligations by submitting a yearly report to the UUA. Report will be submitted in June.

**Goal #3 set at beginning of year:** Make our concern for the environment evident to visitors who come to the building.

- The Energy Star rating award is hung on the wall in a visible place.
- Signage about limiting paper towel use was put up in bathrooms.
- Signs for recycling plastic cups at Social Hour were made more prominent.
- Our Green Sanctuary status is part of the Bellman banner; Green Sanctuary link is on the First Parish home page; Order of Service tells people where to recycle the paper after the service.
- Still to do: reminder signs to turn off lights, and publicize access to the website which monitors our solar output (include on FP home page); add Commit2Respond page to website.
**Goal #4:** Encourage all church committees to integrate concern for the environment in their regular committee activities. We continue to work with the Continuing Ed, Property Committee and especially Social Action (environmental justice).

**Goal #5:** During the church year we will sponsor at least 4 Green Sanctuary events with broad intergenerational appeal.
- This year: Roll and Stroll Sunday on May 21, May 6 Needham Community Farm work day, promotion of April 22 March for Science, which includes kids’ activities.

**Other accomplishments:**
- Just a note that in total, the committee raised $410 for the church this year, from donations triggered by Mass Energy Green Power sign-ups and Mass Save home energy assessments.
- GC initiated a conversation with the local Emergency Planning Committee to see how First Parish could help with emergency preparedness, especially in light of extreme weather events predicted to become more frequent.

**Looking ahead — preliminary goals and issues for next year**
- Goals will be similar to last year's, with plans for a vegan/vegetarian pot luck and a workshop about spiritual resilience for climate activists. We will try to keep up congregational awareness of our Commit2Respond pledge.

**Issues:**
- For our events we would like more participation by young families, and we could always use more members (especially younger members) who can commit time and energy. Most of the work is done by a small number of people.
- Please note that the Green Congregation Committee often works with, and through, other committees or groups. For example, the Property Committee arranges for energy saving building retrofits. Friends of Social Hour finds ways to reduce waste, especially food waste. Social Action is an important partner in environmental justice work. This is the goal of Green Sanctuary – that First Parish’s “green” work is done in many ways and through many committees.

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**THE HOMEGROWN COFFEEHOUSE**

**Committee Chairs:** Jim & Beth Sargent

**Committee Members:** No standing members. This 34 year old ad hoc group is made up of FP members willing to volunteer for production assignments. Each show takes approximately 30 volunteer hours to produce, or about 500 hours total each year. Tom & Muriel Gehman, Jim Long, Gray and Eli Brown, Paul and Leo Rooney, Dee Galacki, and Jesse Bowen have been regular contributors this year, and many others have helped out.

**Mission Statement:** The Homegrown Coffeehouse was launched as a First Parish volunteer activity in 1983, with a mission to bring to Needham a wide variety of the then “folk revival” performers that were just beginning to surge locally and nationally. We opened our 34th season this Fall, marking three decades plus of presenting nearly every major folk performer, and a lot of lesser-known folk artists, plus jazz artists, and pop performers touring nationally. Our First Parish-based folk club is widely recognized as one of the top venues in New England, with a national reputation for excellence.

**Summary of Goals and Accomplishments:**
- **Goal #1, set at beginning of year:** Continue to draw in new audience, nearly all from outside the FP community. **Done**
• **Goal #2, set at beginning of year:** Continue to present new artists as well as established acts. When possible, invite artists to stay over for a Sunday morning service. **Done.** This year we were able to have Vance Gilbert return for a Sunday service.

• **Goal #3, set at the beginning of the year:** Be deliberate in planning multiple performances by people of color and promote those shows within First Parish as action opportunities for our Social Justice volunteers. **Done.**

• **Goal #4:** Raise at least $7,500 for the FP general fund. This was the third consecutive year of exceptionally good financial performance. **Done**

• **Goal #5** Involve new people in the fundraising life of FP. **Done**

**Looking ahead — preliminary goals and issues for next year**

• **Goal:** Raise fundraising target to $8,000 level, recognizing that snow, performer illness, and local competition can have an unpredictable, negative impact. (As it did during our 2016-17 season.)

• **Goal:** Continue to promote the Homegrown Coffeehouse as a premier venue in the Northeast and nationally.

• **Goal:** Continue to use the Coffeehouse as a gateway activity for people looking for an ideal first volunteer activity at FP. We will encourage the children of volunteers to help out--creating a true multi-gen volunteer opportunity.

• Look to involve more of the performers in Sunday morning services, as their schedules allow.

• Look for opportunities to promote performances by people of color and members of the LGBTQ community.

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**THE LAURIE ANN GERBER MEMORIAL FUND**

**Committee Chair:** Jeanne Gerber

**Committee Members:** Joe Gerber, Elizabeth Duhig

**Mission Statement:** We are looking forward to tweaking a new mission statement for the future.

**Summary of Goals and Accomplishments:**

**Goal #1 set at beginning of year:** Continue Alternative Medicine Education

**Goal #2:** Two videos

**Accomplishments:**

▪ Annual Vegetarian Pot Luck Dinner held on June 1, 2016. Over 20 people watched the film “Fed Up” about nutrition in our daily lives.

▪ Continue to loan books and DVDs as people request them.

**Looking Ahead:** Continue our goal of helping to educate people about the relationship between food and health. Continue to offer the use of lending library books and DVDs on healthy living.

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**MEMBERSHIP COMMITTEE**

**Committee Chair:** Kay Taylor

**Committee Members:** Tony Cicala, Laurel Davis, Gail Lehman, Jackie Boni, Amy Brown, Leslie Caulfield, Dick Eastman, Eliot Jekowski (Parish Committee), Chris Pooley, Grace Rising
**Mission Statement:** The Membership Committee supports the work and mission of First Parish in Needham by:

1. Attracting and welcoming newcomers to First Parish
2. Introducing newcomers to Unitarian Universalism and First Parish
3. Connecting newcomers with the ministry, programs, religious exploration, outreach, and social programs of First Parish
4. Where appropriate, facilitating and supporting the journey of newcomers from first-time visitors to active members
5. Nurturing the experience of members of First Parish in their continued spiritual growth and ongoing commitment to the goals of First Parish.

**Summary of Goals and Accomplishments:**

Our first priority remains to grow our current membership. Over the past four years, membership has remained stable, and has increased since the arrival of a new minister in September 2014. We welcomed four new members in 2013, and 12 new members on March 30, 2014. In the fall 2014 we welcomed 15 more members. In the spring 2015 we welcomed 14 more members. In the fall 2015 we welcomed six more members. The majority of new members over the past two years have young children who are participating in the RE program.

Our second priority is to nurture the membership of First Parish through a number of different initiatives. We are working with the new neighborhood map, recent visitors and members have been assigned to neighborhood groups, and some Membership Committee members are serving as neighborhood captains.

We are working hard to “formalize” the path to membership and involvement in First Parish. To that end, we have designed a series of information/orientation sessions for recent visitors. We are currently working on an information/orientation booklet that will bring together information about all the programs of First Parish in one document. This will replace the many pamphlets of information about specific programs.

A Membership Committee member has organized teams of greeters for each Sunday. Membership Committee also has responsibility for providing greeters for summer services.

To coordinate the intake of information about new visitors, we are working with the Minister, DRE, and the parish administrator. As visitors fill out the yellow cards in the pews or sign one of the guest books at each door of the church, we share information with each other. The chair of Membership Committee sends an email to each visitor. New children are gradually enrolled in classes, and names are put in the Realm as soon as it seems appropriate.

**Looking ahead — preliminary goals and issues for next year**

**Goals for the coming year:**

1. We will continue to refine our reach-out to potential members, to provide them with information and to help them get connected to the First Parish Community
2. We will explore ways to reach out to underserved populations in Needham, eg Olin College students
3. We will continue to think about ways to reach out to parents whose children have aged out of the RE program and perhaps left home so that they will continue to be involved at First Parish.
4. We will work with Parish Committee on goals specifically related to growth.

**Issues:**

1. We are concerned about First Parish’s outreach to the community, both in terms of letting the community know about First Parish and also about inviting diverse people to become part of the community. There are many programs and opportunities at First Parish that would appeal to individuals and families in the Needham community if they knew about them.
2. We are concerned about retaining members whose children and teenagers are no longer active at First Parish.
3. We will request a meeting with members of the church staff and Parish Committee officers to discuss how Membership Committee can support the growth goal of the Five-Year Plan.

MEMORIAL FUND AND GARDEN COMMITTEE

Committee Chairs: Elizabeth Duhig & Kay Taylor

Committee Members: Dick Eastman, Tom Gehman, Lyn Jekowsky, Gail Lehman, Mair Lustig, Marylou Manzon, Amy Brown and Lynne Rachlis.

Mission Statement: To continue to accept Memorial gifts to First Parish, acknowledge same, and use the fund with guidance of the deceased's family for special needs of the church.

Summary of Goals and Accomplishments:

Goal #1 – To continue to develop and maintain the Memorial Garden and gardens along Lincoln Street entrance through the year.

Goal #2 – To send a notice to setup a sixth Memorial Window in the near future.

Accomplishments:
- Continued to maintain and add to gardens around the church and Wayside Pulpit.
- Continued to manage Memorial Gifts received this year.
- Continue to maintain watering systems in the garden.

Looking ahead — preliminary goals and issues for next year

* To replace and replenish perennials as needed throughout the gardens.

COMMITTEE ON MINISTRY

Committee Chair: Helen Lane

Committee Members: Nate Harrington, Laura Perez, Tad Staley, Lynne Rachlis, Darren Zinner

Mission Statement: The Committee on Ministry supports the work and mission of First Parish by supporting the minister and the success and growth of the ministries of the congregation.

Summary of Goals and Accomplishments:

Goal #1: Support of the Minister

Each month at the committee meeting a portion of the committee time was spent in support of Rev Catie. This was the third and final year of a yearly evaluation process of Rev Catie’s ministry during her Preliminary Fellowship. In the process of preparing this evaluation, committee members spoke with all of the Program Committees of the Parish. As was accomplished last year the committee will submit the evaluation to the UUA in June.

Goal #2: Supporting the Ministries of the Parish

Recognizing our role as a “sounding board” for the congregation, the Committee spent time in discussion of various ministries of First Parish. In particular the Committee on Ministry contributed personnel and recommendations to the “Making Room “task force, in order to ensure that First Parish could meet the spiritual
needs of more congregants and in a variety of settings. Members took note of committee accomplishments and concerns during the evaluation process.

**Goal #3: Charter and Bylaw changes.**
The Committee formalized the size and scope of its practices to better reflect its mission. The Committee recommended an increase in the number of members from three to up to six, reflecting the best practices of the UUA. A request for changes in the Bylaws were submitted to the Parish Committee for evaluation and subsequent vote.

**Looking ahead — preliminary goals and issues for next year**

Proposed Goal #1 With the completion of the evaluation process for Rev Catie’s Preliminary Fellowship, the committee must decide what would be the next major goal in our mission of supporting the minister and the ministry of First Parish. Topics may include the re-administering a Congregational Survey and beginning the process for hosting and Intern Minister

Proposed Goal #2 As the Committee becomes more confident of its role, the group will look to provide a more complete support for all religious professional staff in this ministry.

Proposed Goal #3 The Committee will provide continued support for Rev Catie in her ministry.

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**MUSIC COMMITTEE**

**Committee Chair:** Jessie Bowen

**Committee Members:** Carol Alper, Katherine Calzada, Ross Donald, Jim Sargent, John Smith; ex-officio: Irina Georgieva, Music Director; Katherine Loftus Campe, Assistant Music Director for Youth and Intergenerational Programs

**Mission Statement:** The mission of the Music Committee is to actively support the music program at First Parish (including adults, youth and children) in both vision and implementation; encourage participation in music programs; serve as a sounding board for staff, music participants and the congregation around music; support the development of an annual Music budget; and ensure the care and maintenance of the instruments owned by First Parish. The committee is composed of a diverse group of parishioners who understand the vital role music plays in the life of the congregation, and are committed to implementing a music program consistent with the congregation’s vision.

**Summary of Goals and Accomplishments:**

- **Goal #1:** With our Music Director firmly settled in and established with First Parish, the Committee is able to review and refresh the Committee’s mission, vision, representation, and communication mechanisms, looking ahead to the future yet building on the past.
- **Goal #2:** To continue building participation in musical programs, and look at ways to which the Music Committee will lead music-related activities outside worship services to build community. (The part-time schedules of staff limit their ability to participate in activities not directly related to worship services.)
- **Goal #3:** To enlarge the Hand Chime group and acquire more chimes to encourage more participation.

**Other accomplishments**

- We improved the physical set-up for singing in the church by purchasing choir risers and ensuring good sight lines for musicians.
We continued with the hymnal project that was started last year by way of a thorough inventory of both gray and teal books. In September, we offered the opportunity to all members to purchase these books and donate them to the church. Members could also purchase hymnals for personal use, if so desired. We are in the final stage of contacting each member who purchased a hymnal so they can have a dedication of their choosing on a chalice bookplate placed on the inside of each book. We reached our goal to have enough of each hymnal to fill the Sanctuary along with copies for the Music Room as well as other designated places.

Music Group membership: Choir – 26-28 Active Members; Song Squad 8-10 Active Members; Ringers – 10-12 Active Members.

UURingers has 8 steady members, and 2-3 other members that frequently participate. After 2 very successful Bake Sales a 3rd octave of chimes was purchased. The UURingers were able to begin using the new 3rd octave for Christmas Eve Services. This Spring the UURingers were able to learn more difficult music for their performances.

A group of choir members have started a Hospice/Healing group named Betty’s Singers. The group was started in earnest after they were able to sing for Betty Byers during the last week of her life. They have a core group of 14 people, meet regularly to rehearse, are building a sizeable selection of appropriate music, and many of them will be attending a weekend retreat on how to build this kind of group. This group will sing for those in Hospice as well as people who are housebound.

We have continued to engage the congregation musically with “gathering music” before the service, having Hymn Leaders (drawn from the members of the Music Committee) at every service to help/encourage the congregation in singing the chosen songs, have invited church members to provide music during the Sunday services, and the Music Committee has hosted a fourth Holiday Sing-Along led by Kate Loftus Campe and Jim Sargent.

Looking ahead — preliminary goals and issues for next year

- **Goal:** To continue building the Adult Choir so all 4 voice parts have the right coverage every week. We will continue to have a professional Soprano and Tenor on board until that time we have a solid full-voiced group.

- **Goal:** To increase the size of both the Song Squad and UURinger groups and continue to sing at multi-generational services. I would like to have a chance to have Song Squad sing for members of the church that are home or hospital bound.

- **Goal:** To continue to build the music program at the church with diverse music and involvement by many.

- **Issues:** Having enough in the budget to include hiring of different musicians to expand the musical diversity during the Sunday services. This past Easter the music at the adult service was helped out by many donations in memory of Mary Bradley to cover the cost of hiring the string quartet.

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**NOMINATING COMMITTEE**

**Committee Chair:** Liz Rover Bailey

**Committee Members:** Alan Robins, Amy Brown, Katie Edwards, Kristin Neff, Gail Hedges (ex officio)

**Mission Statement:** The mission of the Nominating Committee is to present a slate of Officers and members of the Parish Committee for the 2017-2018 year to the membership of the church at its annual meeting.
Summary of Goals and Accomplishments:

- To nominate Officers of the Church for the 2017-2018 year: The Nominating Committee hereby nominates officers as follows:
  - As President – Gail Hedges
  - As Vice President – Beth Sargent
  - As Treasurer – Tim Brennan
  - As Clerk – Katie Edwards
  - As Auditor – Katie Barnett

- To nominate members for the Nominating Committee, the Trustees of Invested Funds, and the at-large members of the Parish Committee: The Nominating Committee hereby nominates members of those groups as follows:
  - Nominating Committee – Amy Cicala
  - Trustee of Invested Funds – John Gallo
  - Parish Committee at-large member – Alan Robins
  - Parish Committee at-large member – Tracy Zendzian
  - Parish Committee at-large member for one year – Jackie Boni

- This year, the Nominating Committee also undertook to help the Worship Committee and the Religious Exploration Committee increase their memberships.
  - Successfully connected at least three interested people with the Chair of the Worship Committee; and
  - Successfully connected at least three interested people with the Chair of the Religious Exploration Committee.

Looking ahead—preliminary goals and issues for next year

- Goal: present a slate of Officers and members of the Parish Committee for the 2017-2018 year to the membership of the church at its annual meeting.

PASTORAL CARE TEAM

Committee Chair: Janet Klein

Committee Members: Rev. Catie Scudera, Buffy Duhig, Phil Griffith, Judy Hadrick, Lyn Jekowsky, Fred Kresse, Helen Lane, Carolyn Lynes, Becky Siebens, Rick Vincent

Mission Statement: The mission of the Pastoral Care Team is to nurture a spirit of hope and caring that reaches out to all members and friends of our congregational community.

The Pastoral Care Team works together to:
1. Identify situations that need caring attention and make appropriate assignments to meet those needs;
2. Support and visit those who are unable to attend church regularly;
3. Support families and friends involved in caregiving;
4. Provide mutual support and fellowship for one another while also looking toward our own spiritual growth and enrichment

Summary of Goals and Accomplishments:

- Goal #1: Continued to explore last year’s theme of End of Life Issues by offering a “Death Cafe” in November, led by Rev. Sarah Lammert. Scheduled a two part workshop on 5 Wishes for this Spring, but did not have the minimum required participants. Will offer again in the Fall.
• **Goal #2:** Continued work to organize a Pastoral Care Lending Library in the Parlor, incorporating new titles on the bookshelves and in First Parish’s online book catalogue The Library Thing.

• **Other accomplishments**
  - Established a monthly Grief and Loss Support Group, led by social worker Andrea Goldberg.
  - Founded Betty’s Singers, a hospice and healing choir, in honor of Betty Byers. Showed the film *Holding Our Own: Embracing the End of Life* to the group, and purchased two copies of *On the Breath of Song: The Practice of Bedside Singing for the Dying* by Kathy Leo. We are collecting our repertoire, rehearsing, and have sung twice each for Betty Byers, Mary Bradley, and Roberta Crocker. Some members will attend Kathy Leo’s June workshop at Rowe Camp on Bedside Singing for the Dying.
  - In-service Team Retreat in January: we reexamined our Mission Statement and Covenant of Confidentiality and explored ways to refresh and nurture our own spiritual growth and practice the discipline of self-care.
  - Rev. Catie led ongoing monthly worship services at North Hill.
  - The ongoing Support Group for Caregivers, which meets twice monthly, led by our member Lyn Jekowsky, a nurse with significant experience, has enjoyed healthy, growing attendance.
  - Sent sympathy cards before the December holidays to those who had lost a loved one in the previous year, and on the anniversary date of the loved one’s death.
  - Continued to share highlights of our Sunday service’s Candles of Joy and Concern in the *Bellman* and *Bell Notes*.
  - Coordinated summer coverage for pastoral care emergencies by pastoral care associates, with professional backup by Rev. Joanna Lubkin while Rev. Catie was away. In addition, monitored office phone calls during our administrator’s summer vacation.
  - Hosted two Social Hours.

**Looking ahead — preliminary goals and issues for next year**

• **Goal:** Offer another session of 5 Wishes in the Fall.

• **Goal:** Explore presenting a year-long theme on Mental Health issues, including presentations about depression, drug and alcohol abuse and addiction. Consider growth into a Mental Health Ministry.

• **Goal:** Finalize work on the Pastoral Care Lending Library and let the parish know this resource is available.

• **Issues:** Caring for ourselves and nurturing our own inner resources so that we are able to care for others is a continuing focus of our team. We will be looking to add new members to fill places left by members stepping down this year.

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**POSITIVELY AGING**

**Committee Members:** Phyllis Beck, Fred Kresse, Helen Lane, Kay Taylor

**Mission Statement:** To provide programs and to build community among the older people in the Parish.

**Summary of Goals and Accomplishments:**

Goal#1 To bring our seniors together with programs of interest and an opportunity to have discussion and conversation.

- The programs are monthly and wide ranging.
- Issues Around Sleep – Kay Taylor
- Eye Health and Issues of Aging Dr. Thomas Hedges
- November Ballot Issues – Susan McGarvey
• Holiday Celebration- potluck
• How Do You Spend Your Time -planning committee
• What Happens When You Get Bad News and What Do You Do About It
  o Kay Taylor and Eliot Jekowsky
• Retirement Communities
• Antiques Roadshow – with Janie Turbayne
• Saronara – So Long - potluck

Looking ahead — preliminary goals and issues for next year

Goal 1: To take stock of what we’ve done and what the group would like to see in the future.

Goal 2: to do some future leadership planning to keep the group going

Goal 3: Get new and younger members.

PROGRAM COUNCIL

Committee Chair: Beth Sargent, as Vice President, Parish Committee

Committee Members: chairs or designated representatives of First Parish Committees or Programs.

Program Council Members:

Helen Lane (temp): Committee on Ministry
Becky Siebens: Racial Justice Task Force
Beth Sargent: Program Council, Homegrown Coffeehouse
Bruce Barnett: Human Resources
Buffy Duhig: Caring Crew, Memorial Garden
Clark Taylor: Social Action
Dana Robinson: Religious Exploration
Dave Mackey: Stewardship
David Mecsas: Communications
Eleanor Rosselini: Green Congregation
Erik Bailey: Finance
Gail Hedges: Parish Committee
Helen Lane: Small Group Facilitators, Positively Aging
Janet Klein: Pastoral Care, Caring Crew, Caregivers
Jeanette Anderson: Archives
Jen Packard: Religious Exploration

Jessie Bowen: Music
Jim Sargent: Homegrown Coffeehouse, First Parish Singers
Katie Edwards: PYC Steering Committee
Katrina Kipp: Green Congregation
Kay Taylor: Membership, Memorial Garden
Liz Rover Bailey: Nominating, Welcoming
Marianne McGowan: Youth Adult, Racial Justice Task Force
Molly Kerrigan: Friends of Social Hour, Kitchen Crew
Muriel Gehman: Kitchen Crew
Helen Lane: Positively Aging
Rev. Catie Scudera: ex-officio, Minister
Scott McCue: Worship
Tad Staley: Small Group Facilitators
Mission Statement: The mission of the Program Council is to help committee chairs coordinate their activities and programs in support of the Church’s mission statement & vision and to serve as a forum to discuss issues and problems, inform each other and the Parish Committee on their activities and to look for support where appropriate. Additionally, the Council serves as a forum where programs can organically be identified and developed.

Summary of Goals and Accomplishments:

- **Goal #1**: Serve as an important cross-committee communication vehicle. We met 3 times over this past church year. All Council members were encouraged to bring their plans and needs to the meetings, and many participated in cross-program communication, offering advice and support to one another, and suggesting opportunities for cross-committee cooperation/joint programming.

- **Goal #2**: Increase the value of this group by making it more entrepreneurial so that it serves as a more vibrant forum for cross-committee program and event idea generation, development and implementation. Council meeting agendas reflected the needs of the groups, including the need for more participants in some of our most-valued programs, including Religious Exploration and Worship.

Volunteer Sunday: Over the summer of 2016, the Program Council began planning a Volunteer Sunday, scheduled for the Sunday after Water Communion, September 18, 2016. All committees and programs were invited to participate. Feedback, post-event, was very positive. Many groups reported an increase in interest in their programs, and several reported signups of new participants. We are already planning another Volunteer Sunday, on September 17, 2017.

Looking ahead — preliminary goals and issues for next year

- **Goal #1**: Provide a vehicle for cross-program communication and support.

- **Goal #2**: Provide increased opportunities for First Parish members and friends to deepen their involvement in our faith community.

PROPERTY COMMITTEE

Committee Chair: Mary Ann Oldfield

Committee Members: Karl Heinz, Ed Quinlan, Carl Franceschi, George Rappolt, David Mecsas, Phil Pierce, Christy Cocchi, Paul Rooney, Jeff Heller; (ex officio:) Frederick Francis, Susanna Whitman

Mission Statement: The mission of the Property Committee is to maintain the facilities of First Parish in optimal condition to better support the activities of the congregation.

Summary of Goals and Accomplishments:

- **Goal #1 set at beginning of year**: Replace Youth & Nursery Room floors.
  Progress towards that goal: New floors were installed in both rooms.

- **Goal #2 set at beginning of year**: Hire a new Sexton.
  Progress towards that goal: Frederick Francis was hired September 2016

- **Other accomplishments**
  - Through our insurance, we were able to recover most of the costs from mice-damaged wiring in the vestibule.
Our new cleaner, Freddie Soto, by his thorough and careful regimen of cleaning has brought the appearance of First Parish to a new level of which we should all be proud. We encouraged NCC to hire him and now the daycare area is equally well taken care of.

A new railing was installed by the chancel stairs; new film installed on Sanctuary windows; Parish Hall floor was screened and refinished

Historic photos of First Parish as well as a series of current photos are now displayed in the hallway adjacent to Parish Hall. The current photos will be periodically rotated.

Looking ahead — preliminary goals and issues for next year

- **Goal**: Reduce our landscaping fee.
- **Goal**: Replace Sanctuary flooring and carpet.
- **Goal**: Install wall to wall carpeting in Choir Loft.
- **Issues**: Frequent elevator repair issues.

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**RACIAL JUSTICE TASK FORCE**

**Task Force Coordinators**: Marianne McGowan, Becky Siebens

**Task Force Participants**: Rev. Catie Scudera, Wendy Blom, Amy Cicala, Kathi Cotte, Linda and Jack Davis, Ross Donald, Muriel Gehman, Don Leathe, Carolyn Lynes, Susan McGarvey, Joan Mecsas, Peter Panov, Fay Remnitz, Clark Taylor, Jonathan Tholl, Pat Tholl, Dick Eastman, Gail Lehman, Scott Muldoon, Marguerite Robbins (Icons Exhibition leader)

**Mission Statement**: The mission of the Racial Justice Task Force is to live into the UU values of justice, respect, and equality by deepening our understanding of systemic racism in our culture; growing in our self-awareness of our own roles in a racist culture; developing our ability to live authentically in a multicultural world; and taking action toward creating a church, community, society, and culture that are not based on racism.

**Summary of Goals and Accomplishments:**

**Goal #1: Offer multiple formats for learning about racism in our society, both to the Task Force and to the congregation.** Progress toward this “internal” goal:

- **Lyceums**: Kenny Wiley, a senior editor at *UU World* and member of the Black Lives of UU; Marvin Venay of the Unitarian Universalist Urban Ministry in Roxbury; Tina Chery and Wayne Daley of the Louis D. Brown Peace Institute in Boston
- Showed film *13th* (about 13th amendment to the Constitution and mass incarceration) followed by discussion
- Sponsored four Actions of the Week in February (read the book *Blindspot* and taking the related self-assessment, attend the race-related films available in theaters, recommended videos exploring race, provided links to works of literature written and/or read by authors of color.
- Arranged for sermon by Ken Wagner on being white in a racist society
- Sponsored an 8-evening series on being white in a racist society, led by Ken Wagner and attended by ~20 parishioners
- Participated in several learning/networking events at the UU Urban Ministry

**Goal #2: Take specific actions to move toward a more just community in Greater Boston.** Progress toward that goal:

- Sponsored a team for this year’s Mothers Day Walk for Peace, supporting Louis D. Brown Peace Institute
- Supported Marguerite Robbins in mounting Icons of the Civil Rights Movement art exhibition
- Plate donations to Louis D. Brown Institute, UU Urban Ministry
Looking ahead — preliminary goals and issues for next year

**Goal:** Conduct a thoughtful church-wide discussion and decision-making process about putting up a Black Lives Matter sign, as an opportunity for dialogue. See this as part of a larger conversation to make the church’s values more visible on its exterior, e.g., through values-based banners or signs. Also, coordinate creating an FPN “parade banner” for use in marches/demonstrations. In both cases, act in concert with other FPN social/environmental action groups.

**Goal:** Explore the possibility of deepening relationships with UU Urban Ministry as it takes its new mission in job-readiness preparation, and with Louis D. Brown Peace Institute (including but not limited to participation in the Mother’s Day Peace March).

**Goal:** Re-evaluate our mission and method of operation.

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**RELIGIOUS EXPLORATION**

**Committee Chair:** Jennifer Packard, Dana Robinson

**Committee Members:** Jodi Rooney, Melanie Guerrero, (ex officio:) Mark LaPointe, DLRE and Jen Duhamel (RE Assistant)

**Mission Statement:** The mission of the Religious Exploration Committee is to ensure the RE program offered at First Parish in Needham meets the needs of congregation families, and is consistent with UU and First Parish principles.

**Summary of Goals and Accomplishments:**

The overarching goal of the Religious Exploration Committee, in partnership with the RE Director, is to oversee the curriculum, teaching guides and resources provided and presented to our children.

Specifically, we strive to offer a program that supports our children’s exploration of the values embodied in our covenant with the seven UU principles. These items include:

- What it means to be a Unitarian Universalist
- Love, encouragement, compassion, and community
- Diversity and acceptance
- The search for one’s own spiritual truth
- Social action and service as part of the interdependent web
- The ability to make informed, ethical choices

**Goal #1** Recruit and support RE teachers enabling the program to present grade level curriculum in collaboration with staff

- Ensure that all RE families understand that their participation is essential. This message is being built into communications from the RE committee and in signup forms for the RE program.
- During the 2016-2017 year we faced some gaps in recruiting adequate volunteers, including leaders and mentors for the Coming of Age curriculum. This accelerated the change to the curriculum that was proposed last year to move the COA program to the 9th grade. Implementation of the new curriculum began this year, ahead of schedule. The revised curriculum will be as follows:
  - 6th Grade – Riddle and Mystery (new curriculum)
o 7th Grade – Building Bridges (formerly called Neighboring Faiths)
o 8th Grade – OWL
o 9th Grade – Coming of Age

Goal #2  Review and revision of the RE curriculum to reflect the evolving needs of our youth and congregation.

- This fall, the DRE and RE committee will test a new curriculum called “Spirit Play” that may be appropriate for our younger children. First Parish will also participate in a training program for teachers of the new curriculum.
- Each curriculum is reviewed and updated on an ongoing basis

- Other accomplishments

  o Teacher experience – Repeated the “RE Teacher Soiree” to thank teachers and to encourage collaboration among grade level teachers and throughout the program. The event had a good turn out and was well-received.
  o Social action – Continued informal expectations that most grades participate in some social action project during the year. Social action boxes are provided to teachers to facilitate this.
  o Outreach – Participated with the Safe Congregations Task Force, met with the Social Action Committee, and provided input to the Making Room Taskforce

Looking ahead — preliminary goals and issues for next year

- **Goal:** Revitalization of the Parenting Your Children (PYC) program
- **Goal:** Improve teacher recruitment outreach and strategies to avoid gaps
- **Goal:** Implement the expanded curriculum as noted above
- **Goal/Issues:** Committee member recruitment. This year, we had only four members on our committee which limited the number of activities we could take on. We hope to expand and diversify our committee membership for the next year. At this point, we have already recruited two additional members for next year.

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**SMALL GROUP MINISTRY**

**Committee Chairs:** Cathy Livingston and Helen Lane

**Committee Members:** Tad Staley, Elinor Brady, Carolyn Lynes, Carol Alper, Rev Catie Scudera.

**Mission Statement:** The mission of the Small Group Ministry Facilitators Group is to organize, promote, and implement the UUA Small Group Ministry Program to further the mission of First Parish.

**Summary of Goals and Accomplishments:**

**GOAL #1: To provide information about Small Group Ministry to the congregation.** This was accomplished in several ways. First, a Small Group Ministry member gave the “Welcome” at a worship services in September and January. At the same time as the “Welcome” in worship, an information table was set up in Parish Hall during social hour with pamphlets, registration form and someone to talk to about SGM. There were a couple of information boxes in the Bell Notes during the year. People were invited to attend open Small Group Ministry sessions. A wonderful Holiday Potluck supper was held for present and prospective members in December.
Goal #2: To maintain present groups and to organize new groups as the need arises. The Wednesday Evening Small Group was revitalized as Cathy Livingston volunteered to be a facilitator for that group. New members joined most of the groups and at this point most of the groups are full.

Goal #3: To update information on the web, in pamphlets and elsewhere. The facilitators group succeeded in revising information on the web. Revisions to other sources of information about SGM will be addressed soon.

Goal #4: To meet regularly to share and discuss group session material and matters of group facilitation. The SGM facilitators meet monthly in an effort to support the ongoing health of the SGM practice.

Goal #5: To recruit and train new facilitators as the need arises. We have recruited volunteers to serve as group facilitators. There will be a facilitator training in June. Our goal is to provide enough SGM to accommodate all of those interested in joining a group.

Looking ahead — preliminary goals and issues for next year
Future Goal: To set forth some procedures for the process of becoming a Small Group Ministry participant.

SOCIAL ACTION COMMITTEE

Committee Chair: Clark Taylor

Committee Members: Cassie Bailey, Joan Benzie, Liz Campbell, Peter DiMarzio, Eva Jansiewicz, Becca Malakoff, Gwen Mecsas, Scott Muldoon, Deborah Niles, Zack Packard, John Petrovato, Will Rico, Eleanor Rosselini, Catie Scudera (ex-officio), Becky Siebens, Pat Tholl, Rick Vincent, Tracy Zinner

Overall Summary: First Parish Needham is a very socially active congregation! The Social Action Committee (SAC) has come to see itself as a hub for social and environmental justice activity in the church. Major streams of activity represented on the committee include the Green Congregation, the Racial Justice Task Force, the Generic Ministry, the Welcoming Committee, the Immigration Ministry, the Youth Group and, most recently, PATH (People Against the Trafficking of Humans). Each of these will be included in separate reports. In addition there are many other social action ministries carried out by individuals. Members volunteer with the UU Urban Ministry and UU Mass Action, the Needham Area Immigration Justice Task Force, the newly formed Witness for Justice group and, in one case, with a Boston public school library.

The mission statement in the FP Five Year Plan identifies the church as one that “works for social and environmental justice initiatives locally and throughout the world.” The Plan also includes the words “making social and environmental justice more central to our identity.” The SAC aspires to bring life to these statements such that when members are asked about the program of our church they will naturally be moved to say, “Our church is one which features social and environmental justice.”

The following goals and our activity within them are responsive to the Goal in the Five Year Plan that calls for a greater emphasis on social and environmental justice. Measuring our success in this broad dimension is difficult, but a sounding taken by the SAC chair at a Program Council meeting drew a positive response, that the justice-related activities of the church are contributing to making social and environmental justice more central to our identity as a church. Please note that many of the specific justice accomplishments in the church will be in the report of the major programs listed in the first paragraph of this overall summary. The SAC itself seeks to nurture and support the leaders of the major programs and to provide a forum where we can all know what is happening in our dimension of the church’s life.
An important change this year has been to make it possible for families with young children to participate through the addition of child care and the change of the meeting time to 6:30-8:30, rather than a later time, as before. The earlier meeting time makes it possible for parents to get home in time to have their children in bed at an appropriate hour. The SAC is also pleased to have three high school young people in its membership. This change has helped the SAC increase its membership in a very healthy way. It is also a way of addressing a broad SAC goal of engaging “all ages as we seek to offer a variety of ways to live our congregation’s commitment to social and environmental justice.”

Summary of Goals and Accomplishments

1. The first goal of the SAC is to inventory all of the social action initiatives associated with First Parish, documenting their current status and responding to their needs as necessary.
   a) In the early months of the reporting year we interviewed leaders of social justice activities led by people who don’t regularly report on them to the SAC. These included the Mitten Tree, the Grow Clinic and the First Parish religious exploration program. We also interviewed Rev. Catie for her vision for the church justice program.
   b) Those interviews responded to a second goal: “Create an environment where all of these SAC initiatives see themselves as a part of one integral social and environmental justice program at the church.” Certainly it was our goal in holding the interviews noted above to help leaders experiences themselves and their important activities as an integral part of the justice outreach of our church. Those who represent major programs on the SAC, including the Green Congregation, the Racial Justice Task Force, the Generic Ministry, the Youth Group and the PATH (People Against the Trafficking of Humans) learn about and participate in making suggestions to the SAC members. Interviews with the smaller programs fill out the full picture.

2. On the foundation of that knowledge, then, the SAC plans additional special and ongoing new programs. An example of a new special program is the civil rights icons program scheduled for the final weekend in April, for which the SAC and the Racial Justice Task Force are carrying out a supportive role. An example of a new ongoing program is the projected possibility that FP will become a "Sanctuary-Supporter Congregation," to be partnered with a faith community that will offer a sanctuary apartment in its building to an undocumented immigrant individual or family. These are people who are in jeopardy of being deported to a country of origin from which they fled, often in fear of their lives. The plan is for a faith community that offers physical, live-in sanctuary to an undocumented person or family will be assisted by a cluster of supporting congregations.

3. A third goal, is to work toward a greater balance between justice activities that are a form of charity, i.e., meeting the important needs of individuals or groups without a dimension of trying to change the system of which they are a part--and systemic change, which is action directed in some measure to change a system that oppresses people or harms the environment at a more systemic level. Examples of the former include the Generic Ministry, which helps meet the needs of the homeless in Boston; the Mitten Tree, which serves lower income people in Boston meet their needs and also provides presents for children living in low-income homes; and the Grow Clinic, which works with an agency that helps children from low income communities to thrive in a more healthy way. Examples of the latter include legislative activity at the state and national level dedicated to climate justice, immigrant rights, trafficked individuals’ rights etc. It also includes participations in various campaigns, including an effort to stop pipelines projected to carry fossil fuels that hurt the environment of everyone.

4. A fourth goal is to communicate regularly with the congregation about the social and environmental justice issues that that the church is engaged in and to offer members the opportunity to participate in them. This is accomplished through blogs in the Bell Notes and announcements in the worship service bulletins.
Looking ahead—preliminary goals and issues for next year.

1. Reach a positive decision by the congregation to become a Sanctuary-Supporting Congregation, representing a willingness on the part of the church to support the safety and well-being of undocumented immigrants threatened by deportation. This would involve supporting a faith community which is committed to providing physical sanctuary, i.e., an apartment for an undocumented individual or family in its building where the congregation worships. In making this decision the church would become part of a cluster of four or five faith communities in which one would offer physical sanctuary and the others would provide assistance with whatever was needed for the comfort and well-being of the undocumented individual or family until their case was resolved and they have received asylum with a green card providing a path to citizenship.

2. Consider and reach a decision about whether and in what ways First Parish would enter into a relationship with the Guatemala partnership currently sponsored by the Congregational Church of Needham. At one level this could involve the church as a co-sponsoring partner in the partnership with the village of Santa María Tzejá. Other possibilities could include sending FP parishioners as participants in the two delegations the partnership sends each year to the village. Another possibility is for FP members to participate in one or more of the three fundraisers the partnership holds each year. Typically these include a “Servathon” in which individuals take pledges from other church members and then participate in a work day for a good cause; a huge yard sale, which draws from the sponsoring church(es); and a concert or talent show. All of the fundraising activities provide high-spirited activity on the part of participants. The plan is to introduce these possible options before the end of this church fiscal year and follow up with forums in the fall leading to an appropriate decision in the later fall.

WORSHIP COMMITTEE

Committee Chair: Scott McCue

Committee Members: Jeanette Anderson, Jim Leffingwell, Phil Lynes, Liz Rover-Bailey, Kim Hokanson

Mission Statement: The Worship Committee is concerned with all aspects of the worship experience. The Worship Committee works with the Minister on the design of weekly and long-term worship experience at First Parish. The Worship Committee oversees the summer component of worship and coordinates worship for Sundays when the Minister is not in attendance. The Committee works with the RE Minister, the RE Committee, the Music Director, the Children’s Choir Director, the Music Committee, and other committees to ensure smooth functioning before during and after each service. It also serves as a resource for the congregation to incorporate their ideas and respond to concerns about the worship experience.

Summary of Goals and Accomplishments:

- **Coordinate Worship in the Absence of the Minister** The committee has worked hard to ensure worship is coordinated in days that the minister is not in the pulpit. In the 2016-2017 church year, this has included:
  - 9/25: Rev. Michelle Walsh
  - 10/16: Rev. Laura Randall
  - 11/27: Rev. Phyllis O’Connell
  - 12/25: Lay Led Service
  - 1/1: Ken Reeves
  - 1/22: Ken Wagner
  - 319: Rev. Fred Small
  - 5/28: Rev. Phyllis O’Connell

Committee members and other members of the Congregation served as Worship Associates on these dates.

- **Support Year-Round Worship and Organize Parish Hall (Summer) Services:** Phil Lynes has generously agreed to serve as Summer Service coordinators once again. To date, we have secured leaders and Worship Associates for many of the summer services.
Looking ahead — preliminary goals and issues for next year

- **Goal A**: Support the continuing expansion of the committee—we are aggressively recruiting, which will hopefully reduce the logistical demands on any individual committee member—but hope to do so in a way which preserves committee cohesiveness. Similarly, Phil Lynes will be stepping in as Committee Chair.
- **Goal B**: Continue to support to work associated with our growing congregation, ensuring that all members have access to meaningful worship, with the new structures being piloted next year.

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**YOUTH ADULT COMMITTEE (YAC)**

**Committee Chair**: Marianne McGowan

**Committee Members**: Cassie Bailey, Kate Loftus Campe (ex-officio), Erin Gilmore, Molly Kerrigan, Mark La Pointe (ex-officio), Gwen Mecsas, Priscilla Mullin, Emma Needham, Zach Packard.

**Mission Statement**: YAC is comprised of Youth Group representatives, adult volunteers, parents, and the Youth Group Advisor. YAC strives to support the mission of the Youth Group. Please see the specific Youth Group goals, as described below:

- To provide youth with a safe and affirming social environment in which they can build strong bonds of friendship, experiment with their own identities, and grow as social beings within the community;
- To give youth a place and the tools to explore religious understandings and spiritual issues—issues of meaning, purpose, ethics, and responsibility;
- To expose our youth to Unitarian Universalism, giving them a greater understanding and ownership of our religious tradition;
- To help our youth grow to be responsible members, contributors, and leaders in the communities they are a part of, including, the First Parish community, the Needham and Greater Boston community, the district and continental Unitarian Universalist community, and the world community;
- To help our youth feel connected to the world through direct service and reflection, and to help them explore and think about important social issues;
- To reach out to youth who are searching for community or grappling with religious and spiritual questions.

With this as our mission, the YAC strives to foster and create an inclusive and welcoming community, open to the presence and contributions of all youth.

**Summary of Goals and Accomplishments:**

1. **Goal**: To increase consistent Senior Youth attendance and engagement in the Senior Youth Group, including those on different school calendars, and to increase awareness of the Senior Youth Group with the greater congregation.

   **Accomplishments**: The Youth Group strives to welcome and include all who want to participate. Participation this past year dropped off a bit after the Welcome Back barbeque at the beginning of the church year. Efforts were made to reach out to those members who stopped coming to meetings, as well as to encourage members of the Freshman Class to come to Youth Group meetings. For most of the year, one Freshman participated in the group. Considerable efforts also were made to include youth who attend private school. These students have a different vacation schedule and, as a result, have not been able to go on the annual service trip, which alternates between the February and April public school vacations. Students who cannot participate in the service trip feel disconnected from the group because of the work that goes into planning and fundraising ahead of the trip, as well as creating the service that follows it, thus making the trip a pivotal part of the Senior Youth Group program. The service trip was structured differently this year, in large part to enable those students to participate in at least half of the trip. Although that did not happen, YAC remains open to the possibility of including the private school students should they desire to join. Reaching out to all high school students remains an ongoing effort.
The Youth Group’s presence within the congregation has been greatly enhanced through the Soup Sunday program, which occurs on the first Sunday of every month. In addition to raising money for the service trip, selling delicious, home-made soups creates a feeling of good will among the adults and youth in the church.

2. Goal: To find ways to bridge the gap between the Junior Youth Group and the Senior Youth Group, such as occasional attendance of a Senior Youth to the Junior Youth Group meeting.

Accomplishments: The Senior Youth in YAC have presented ideas for ways to better connect with the Junior Youth, such as having a different Senior Youth Group member attend a Junior Youth Group meeting. However, none of these ideas has been fully implemented to date. We are still planning the annual ice cream social to welcome the rising freshman to the Senior Youth Group at the end of the school year.

3. Goal: To incorporate spiritual activities that are meaningful to the Senior Youth in the Senior Youth Group meetings.

Accomplishments: Although this has been discussed, nothing has been decided. The goal of bringing spirituality to the group continues to evolve. The youth for the most part find spiritual fulfillment in their interpersonal connections.

4. Goal: To participate in meaningful service projects, including but not limited to the annual service trip.

Accomplishments: The Youth Group went on their annual service trip in April to Thompson Island and Nashua, New Hampshire, and has participated sporadically in other activism and service opportunities. This continues to be an area of growth for the youth, who draw on their experiences on the trip to create the annual Youth Service in May.

5. Goal: To continue providing opportunities for the Senior Youth to take on leadership roles, such as participating on First Parish Committees and/or teaching Religious Education.

Accomplishments: Some of the youth have embraced this goal and taken on leadership roles at First Parish, including participating on Committees, such as YAC and Social Action, and teaching RE. Four of the youth joined First Parish as members this past year. The congregation approved a by-law change that gives voting privileges to its younger members by lowering the minimum age to 16 from 18, thus enabling our youth members to fully participate in the life of the Parish.

6. Goal: To improve communication both within the Senior Youth Group, and with the Youth Group leadership and Senior Youth Group parents.

Accomplishments: Communication has improved dramatically this year. Kate and other leaders regularly communicate with youth and parents on the First Parish Youth Group Facebook page. Calendars and all other necessary communications are shared with parents in a timely manner.

Looking ahead — preliminary goals and issues for next year

It is likely that many of the goals from this year will be continued in some capacity next year, as these goals are critically important to the success of the Senior Youth Group, and the challenges are always changing. In addition, we will consider the following new goals.

1. Goal: To select a new Youth Program Coordinator to replace Kate Loftus Campe, who served as an interim coordinator this past year.

2. Goal: To recruit more members for the committee, as we will lose our three senior youth members.
FINANCE COMMITTEE

Committee Chair: Erik Bailey, Treasurer

Happily, the 2016-2017 church year has continued the progress that we made last year. In the third (and final) year of Erik’s Treasury duty, forecasting and transaction accuracy are both improving, which is allowing for improved predictability in the numbers. It is, of course, an ongoing process, but one that is progressing well. Each year there is always some uncertainty in the numbers, and this year is no exception, but this uncertainty is within a comfortable range.

As in past years, this report is organized into the following sections: Report on Last Year (FY16: 2015-2016), Report on Current Year (FY17: 2016-2017), and Report on for Next Year (FY18: 2017-2018).

Report on Last Year (FY16: 2015-2016)

Due to the timing of our Fiscal Year (July 1 - June 30) and Annual Meeting (late May of each year), it is not possible to report on a complete fiscal year at Annual Meeting. Therefore, a brief summary is presented here of the finances from the previous year, now that they have been closed. Note that a few late pledge receipts are still being received for this period, so there could still be minor updates to these numbers, but they would not impact the overall results.

Last year’s report noted: “Assuming a 97% collection rate, there will likely be a surplus of approximately $54,000. However, the 2015-2016 Auction was intended to spread over two fiscal years, so $10,000 of that surplus was anticipated and budgeted for FY16 and will be applied to FY17. As such, the actual net surplus would be $54,000 - $10,000 = $44,000.”

Total income from pledges for FY16 was $320,351, including $14,585 in early payments (prior to July 1, 2015) and $5,899 in late payments (after June 30, 2016). This is an almost perfect alignment with the $319,888 in pledge commitments recorded in Realm, which means that our collection rate was again better than expected. This is two years in a row that we have collected essentially 100% of the pledge commitment, well above our 97% target. The congregation as a whole should be deeply proud of this performance! As described below in later sections, we will be factoring this performance into the FY18 budget. Total income from all sources was $465,267, which was $20,330 (5%) more than budgeted.

Total expenses for FY16 were $419,475, which was $15,462 (4%) under the budget of $434,937. (This is a significant improvement from FY15 where expenses were 3% over budget)

This means that, overall, FY16 had a $51,738 surplus. This compares favorably with the estimate of $54,000 given in this report one year ago. As noted in last year’s report: “However, the 2015-2016 Auction was intended to spread over two fiscal years, so $10,000 of that surplus was anticipated and budgeted for FY16 and will be applied to FY17.” Therefore, the actual unbudgeted surplus from FY16 was $41,738.

This money has not gone to waste! It has helped bolster our bank account balances from their low-water mark of $72,000 in October, 2015 to over $180,000 today. Generally, it is recommended that non-profit organizations have cash reserves of 3-6 months of operating expenses; at a run rate of slightly under $40,000 per month, we are averaging approximately four months of reserve, which is perfect. Ideally the bank balances are above $150,000, and they have been recently which is great! The chart below shows the bank account balances from January 2013 through March 2017, with the target $150,000 line highlighted:
As noted last year, we are continuing to work to improve the financial forecasting; some progress was made this current year (FY17), and further improvements have been made in the proposed budget for next year (FY18).

Report on Current Year (FY17: 2016-2017)

The current church year (FY17, representing July 1, 2016 through June 30, 2017) is progressing well from a financial perspective. The information contained here is based on 9.5 months of actual data (July, 2016 through mid-April, 2017), as well as extrapolated projections for the rest of the fiscal year. As is the case each year, final numbers will not be available until September or possibly later.

There were several changes with financial implications this year. These are listed below, with the impact to the budget described.

I. Increased Income budget
   A. As described in last year’s report, we increased the budgets for Income, which has help us budget more accurately. For example, the Collection Plate, Ballet Rental, and Planned Donations income lines were all increased and/or corrected for this year.
   B. However, despite this, our Income budgeting was still shy of actuals, leaving realized income that could have been budgeted for expenditure unallocated.
   C. Since this is now two years in a row that Income has been under-budgeted, the process will be further optimized for next year (FY18); see further below in this report for details.

II. Staff and Compensation
   A. Compensation for the First Parish staff was adjusted for this Fiscal Year; the details are available in last year’s Report to Annual Meeting. The adjustments ensured that all staff are above the UUA’s “Minimum” compensation level for our category of church (Mid-Size II, Geo Index 5).
   B. The pay rate for our teens who provide childcare was also increased this year (from $10 to $12 per hour).
   C. There was a change in the Youth Advisor role, transitioning from Sophie Hadingham to Kate Campe. This did not impact the budget, though.

III. Capital Purchases
   A. The new “Capital Purchases” category allows for budgeting of a pool of funds to be used for capital (non-recurring) expenses without having to plan them in advance as part of the budget.
   B. Over time, the hope is that the church will identify a list of needs that can be prioritized and purchased over several years. This is similar to the way the Town of Needham budgets capital items, and it works very well.
   C. For this year (FY17), the budgeted amount ($2,000) will be used to help fund the Worship Café (see below).
IV. Financial Improvements
A. A new part-time Bookkeeper (Jenny Conley) joined us in February, and has been extremely helpful in taking much of the financial load off of Susanna. Although her hourly rate is higher than originally budgeted ($35 per hour versus the budgeted $19, for approximately 2 hours per week), since she started midway through the year there is actually no impact to the overall budget.

B. Significant clean-up has been performed on the First Parish finances (primarily in QuickBooks), thanks to Phil Murray. Reconciliation has now been performed for all of FY16 and FY17 (YTD), bringing our books up-to-date compared to our financial institutions. Furthermore, new processes are in place to keep the data current and consistent. We are lucky to have Phil’s accounting expertise to have helped out here!

V. Worship Café
A. The congregation has responded enthusiastically to the recommendations Making Room Task Force, and we are excited to report that the Worship Café will be moving forward!

B. It is initially being funded with $9,500 of funds, broken down as follows:
   1. $2,000 from the Capital Purchases line item from the FY17 Budget (the full amount)
   2. $2,500 from the Woburn Grant, which Parish Committee applied for specifically for this purpose
   3. $5,000 from a gift from generous donors, which has been confirmed to be able to be used for this purpose

C. These funds are intended for capital (one-time) purchases; ongoing operating expenses are part of the proposed FY18 budget, described below.

VI. Sanctuary Floor
A. It has recently come to the attention of Parish Committee and the Treasurer that there is an anonymous donor who has offered to cover $10,000 toward the cost of renovating the Sanctuary floor (under the pews). While not all gifts targeted at specific purposes can be accepted (since they cause changes to funding priorities), this gift fulfilled a need that would have been required anyway.

B. This extremely generous offer required a commitment that the work would be performed this coming summer, so the timing was tight. Parish Committee voted on April 19, 2017 to move forward with this process. The expected total cost of the renovation is approximately $20,000-$25,000, and the expenditures are capped at $25,000 unless additional authorization is granted by Parish Committee.

C. The renovation will be funded as follows:
   1. $10,000 from the aforementioned targeted donation
   2. $6,232.34 from the “Contingency” line item in the FY17 budget (the entire amount)
   3. The remainder (approximately $4,000 to $9,000) from the FY17 “Building” budget. This will place it significantly over budget, but we are tracking to a surplus and this expense can be accommodated without impacting the overall budget.

At the time of the writing of this report (late April, 2017, with minor revisions to this section in early May), Expenses are tracking to approximately $4,000 over budget (inclusive of the Sanctuary floor expenditures; it would be approximately $9,000 under budget otherwise). Similar to last year, although the Building category is tracking to $21,000 over budget (inclusive of the maximum $9,000 Sanctuary floor maintenance expense), most other most other categories are under budget. What has become apparent in the past two years is that many committees under-spend their budgets. When there are many line items that are underspent, it results in lower expenditures than expected. As such, the FY18 budget (see below) is adjusting several of these items downward, to be more in line with actual expenses.

First Parish as a whole performs admirably well on pledge collection. We have been budgeting at a 97% collection level, but the reality is that we are pretty reliably at almost 100%. As such, we have actually been under-budgeting our income, resulting in unbudgeted surpluses. We have looked closely at the actual receipts for this point in the year (about three-quarters of the way through the fiscal year), comparing them both to the same point a year ago as well as the overall (complete) collection of last year. A few notable points:
Two years ago (FY15), $50,289 was collected after April 1 ($8,181 being “late”, in that it was collected after the close of the fiscal year on June 30), out of a total FY15 pledge receipt of $313,589. For record-keeping purposes, the $305,000 of early and on-time receipts are recorded in the old QuickBooks file; the late receipts are in the new QuickBooks file. Note that FY15 receipts were front-loaded: $202,292 (almost two-thirds) had already been received by December 31; it is highly likely that the change in the Fiscal Year was a major factor in that.

Last year (FY16), $86,137 was collected after April 1 ($6,089 of that was considered “late”), out of a total FY16 pledge receipt of $320,541. For record-keeping purposes, the $14,585 of early payments of FY16 are recorded in the old QuickBooks file; the on-time and late receipts are recorded in the new QuickBooks file. This is 27%, which matches up well with the fact that this represents one quarter of the fiscal year (plus additional time for late receipts).

This year (FY17), as of the end of March, we have received $258,304 (of which $13,263 were early payments prior to July 1), which represents 78% of the total pledge commitment (in Realm) of $329,885. This means that we still have 22% to collect for April, May, and June (plus late receipts), which based on the past two years seems very achievable.

The result is a high confidence in the projections for income at this point in the fiscal year. We expect to receive close to 100% of the $329,885 of committed pledges (not including Donations). We have received over $20,000 of Donations this year, some of which were in lieu of pledges. Summing these together, we expect to receive a total of about $350,000 of Pledge plus Donation income. The budget was $346,000 so this represents a small surplus of income (a good thing!). However, we budgeted at 97% collection (forecast Pledges + Donations was projected at $356,000 and we budgeted at $346,000), and it looks like we are exceeding that. Pledge receipts should come in very close to the $329,885 total (although there are a few cases where outstanding pledges have been forgiven, so it is unlikely to reach exactly that level). Donations are somewhat under the planned $26,000 amount (which may have been unrealistic), but even so we expect that the total here will be about $350,000 or about 98% of projected total. If the Donations expectation had been lower, it would likely have been 99% or higher.

Assuming a total of about $350,000 in Pledge and Donation revenue (once all late receipts are collected), total income is projected at approximately $469,000 (exceeding the $452,181 budget by almost $17,000). Part of this is credited to some one-time fundraising activities (including cashing in the rewards on the church credit cards), and an insurance reimbursement for the wiring damage in the vestibule, but other factors include higher-than-budgeted rental income from the Ballet (we will be adjusting the income expectation accordingly for next year).

Therefore, the total projection for FY17 at this time is a surplus of approximately $3,000. Due to the two-year budgeting for the Auction held last year, this year (FY17) was intended to have a net deficit of $10,000. Therefore, the positive swing is approximately $13,000. Of course, this may change in the upcoming months, and especially the uncertainty of the Sanctuary floor expense may cause fluctuation of these numbers. However, it is almost certain that there will be a surplus for this fiscal year. Last year’s report noted that we hoped to improve the financial projections; we believe that we have done so incrementally, and will continue doing so for the upcoming fiscal year.

Report on Next Year (FY18: 2017-2018)

All of the factors described above (and more) have been taken into account when planning the Fiscal Year 2017-2018 (“FY18”) budget. Specifically, the following changes are being made:
I. Improved Income forecasting
   A. Since pledge collection is tending toward 99+%, it makes sense to budget that rather than the 97% used
      the past couple of years. It not only ensures that we fully take advantage of our pledge collection, it also
      makes the financial analysis process easier, since it is a true comparison of commitment versus collection.
      Therefore, the FY18 budget will project 100% pledge collection, and if we fall a bit short, we can adjust
      this next year for FY19 to perhaps 99% or 98%.
   B. Related to the above point, Pledges and Donations will now be listed as separate line items in the budget,
      making it easier to correlate with Realm.
   C. The estimated income from the Ballet lease has been increased, to reflect actual receipts so far (it is not
      possible to predict this perfectly, since it is an hourly contract).

II. Staff and Compensation
   A. We are pleased to continue the staff compensation adjustments that were instituted last year (and were
      very well received by the staff)! For the second straight year, salaries move 45% of the way from their
      current position (reflecting last year’s increases) to the UUA’s “Midpoint” compensation level. This
      enables everyone to be at least approximately halfway (ranging from 46% to 79%) along the continuum
      from Minimum to Midpoint (pro-rated).
   B. The new compensation amounts and increases are as follows (UUA Minimum and Midpoint also shown,
      pro-rated based on number of hours worked):
      4. Mark: $49,015 (full time), increase of $3,465 (7%). Minimum = $45,350, Midpoint = $53,250
      5. Susanna: $41,089 (6/7 time), increase of $1,096 (3%). Pro-Rated Minimum = $36,171, Pro-Rated
         Midpoint = $42,429
      6. Irina: $26,673 (1/2 time), increase of $1,658 (6%). Pro-Rated Minimum = $24,725, Pro-Rated
         Midpoint = $28,700
      7. Kate: $11,186 (1/4 time), increase of $421 (4%). Pro-Rated Minimum = $10,100, Pro-Rated
         Midpoint = $11,700
      8. For reference, the UUA’s Salary Recommendations for 2017-2018 are available at:
         http://www.uua.org/careers/compensation/fair/congregational-staff (Geo Index 5)
   C. It is expected that our DLRE Mark LaPointe will take a Sabbatical leave in the Spring semester next year
      (likely April through June of 2018). From a budget perspective, this requires an increase in Jen
      Duhamel’s hours to cover the time that Mark will be away from First Parish. As such, there is a
      temporary (one-year) increase from $7,300 to $10,000 for “RE Admin Support”.
   D. Jenny Conley has been very successful at the new Bookkeeper role, assisting Susanna with QuickBooks
      and other financial matters. However, as noted above, her $35/hour rate is considerably higher than the
      originally-budgeted $19/hour (which wasn’t really a realistic number anyway). As such, the budget has
      been increased to enable her to spend an average of two hours per week working with the financial
      recordkeeping systems. There was no need for a Payroll Tax since she is not a formal employee, so that
      line item has been eliminated.
   E. Although the capital costs for the Worship Café are covered until the current year (FY17) finances, the
      operational costs must be accounted for next year (FY18). It is hard to know what these will be, but
      certainly a part-time person will be needed to set up, operate, and take down the audio-visual equipment
      for each service. The best estimate is currently $4,000 for the year; there is not yet an estimate of the
      number of hours per week it would require.

III. Expense Line Items
   A. Several expense line items have been increased from last year to account for rising costs (e.g., new
      Water/Sewer rates in Needham, higher Insurance premiums).
   B. The Worship Café live streaming capability will require faster Internet connectivity, so a buffer has been
      left in the Telephone/Internet line item to account for that.
   C. Green Congregation has requested a $300 budget per church year.
D. The Music Accompanists/Singers line has increased to allow for additional hiring of accompanists for Summer Services, as Irina will be restructuring her hours to work a 10-month year (same number of hours per year, but more hours per month for fewer months).

E. Several of the Office line items have been decreased to reflect actual spending.

F. The UUA and New England Region dues have increased, a consequence of our growth!

IV. Contingency

A. While it is generally good practice to have a Contingency line item, and the fact that we have one this year (FY17) helps to enable the Sanctuary Floor refinishing project, the reality is that this is not required for our purposes, and is just a holding pen for funds that could otherwise be expended in a planned way.

B. If there is a need to spend beyond the budget, we have the funds in the bank to run a deficit. Of course, this cannot be standard practice, but overrunning the budget by $10,000 one year will not cause any lasting issues.

C. Accordingly, the Contingency has been drastically reduced. It is still present (if only to provide a convenient way to adjust the expenses to balance the income), but rather than targeting a $6,000 or more amount, it now targets under $1,000.

FY18 Budget

Through the generosity of the congregation, responding to the “Our Values. Our Growth. Together!” pledge drive, we project total Pledge and Donation income receipt to be approximately $358,000 for FY17 (assuming a 100% collection rate of the expected pledge commitment projection of $343,000 and donation projection of $15,000).

This pledge commitment is a 3.6% increase over FY17 (less than the 5.3% increase last year). A full Auction is planned for FY18, which is expected to raise approximately $20,000. The funds from this auction will be distributed across FY18 ($10,000) and FY19 (the remainder).

Additionally, we expect to receive approximately another $107,000 from various sources (building rental being the single largest source), for a budgeted total income of $485,026.

Our budget has expected expenses of $475,026 (inclusive of the small Contingency) and $10,000 as “positive net income” (i.e., a $10,000 surplus, which will be applied FY19). As noted in last year’s report, it is important to note that this budget is intentionally not “balanced”, due to this planned surplus representing the Auction carry-over.

The tables on the following pages provide first a high-level view of the budget on the first page (all income lines and a summary of the expense lines), and then complete detail per category on subsequent pages. Variance from FY17 budget is shown where there were changes. New for this year is the Actuals for the previous Fiscal Year (FY16 in this case), which some may find interesting. Note that as of FY18 Pledges and Donations are being listed separately, so the Variance should be considered in aggregate for those two lines. This budget was approved by the Parish Committee at the April 19, 2017 meeting.

We extend our gratitude to the membership of the congregation for its generosity and commitment to First Parish, enabling us to fund the programming of the church in a way that is as fair and beneficial to all as possible. We look forward to a wonderful 2017-2018 church year!
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<td>FY18 Budget</td>
<td>Variance</td>
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<td>--------------------------------</td>
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<td>In Lieu of FICA</td>
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<td>Variance</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------</td>
<td>-------------</td>
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<td><strong>Music Accompanists/Singers</strong></td>
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<td>FY18 Budget</td>
<td>Variance</td>
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<td>Capital Purchases</td>
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<td>Net Income/Expense</td>
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<td>$10,000.00</td>
<td>$20,000.00</td>
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</table>

NOTE: This budget is intentionally not “balanced” – it has a $10,000 surplus, due to the planned Auction (whose revenue will be spread over two fiscal years).
AUDITOR’S REPORT
Fiscal Year 2016-2017
Auditor: Gray Brown

To the Members of First Parish Needham

May 8, 2017

As a member of First Parish, and appointed auditor for this fiscal year, I have inspected the Treasurers statement of assets and liabilities as of May 8, 2017 and the related statement of revenues and expenses. I have also checked monthly reconciliation reports, bank statements, and Credit Card statements. I have also checked changes in fund or net asset balances for the fiscal year just ended.

I have found the balances displayed to be correct.

I also reviewed Monthly Payroll reports, 401k / Pension statements, and several transactions including mortgage payments, utilities, and workers compensation, noting all are up to date. Insurance documentation for the Church, and Renters of the Church was examined and current.

I have submitted a more detailed report available to the Parish Committee.

My inspection and report are not meant to be construed as an audit and opinion rendered by a Certified Public Accountant.

Respectfully Submitted,

Gray Brown
TRUSTEES OF INVESTED FUNDS
2016-2017 Fiscal Year

The First Parish in Needham, Unitarian Universalist
Summary of Endowment - Invested Funds
Prepared April 14, 2017 by the Trustees of Invested Funds

Trustees: Philip Murray, Nancy Simpson-Banker, Gray Brown

**Article VIII, section 6 of the Church bylaws stipulates** “The trustees of Invested Funds shall hold all legacies, permanent donations, funds, securities, and endowments heretofore or hereafter transferred to them by the Church, the Meetinghouse Fund, the Memorial Fund, or the Parish Committee.” The section also defines an annual spending policy of endowment funds - “Subject to any restrictions applicable to income earned on restricted gifts, legacies, or special purpose funds, the Trustees shall pay over to the Treasurer annually a percentage of funds equal to the previous year’s Consumer Price Index (CPI) as defined by the Bureau of Labor Statistics, bounded by a minimum payment equal to two percent of the applicable funds and a maximum payment equal to five percent of the applicable funds. Funds to be defined as the unrestricted funds value at the beginning of the church’s fiscal year. The amount to be distributed will be determined by multiplying the beginning value by the percentage determined by the Trustees.”

**Significant Actions of the Trustees this Year**

**Requested a change to distributions from the endowment:**

The Trustees submitted an amendment request to the Parish Committee for consideration at the Annual Meeting that would require the Parish Committee to notify the Trustees whether an annual distribution from the Endowment is necessary. The amendment as submitted is shown below.

An amended section 6 would incorporate changes to the fifth paragraph and add a paragraph that places an additional review function with the Parish Committee.

The Parish Committee shall after the fiscal year financial statements are complete determine whether or not there is a financial need of an annual distribution from endowments overseen by the Trustees, subject to any specific requirements of restricted gifts, legacies, or special purpose funds. If it is determined by a vote of PC that the church financial situation requires a distribution, then the Trustees will prepare a distribution from endowment fund(s) as determined by the spending formula.

**Formalized investment policy and review process**

The trustees voted to adopt an endowment investment policy - a long-term investing horizon with assets allocated 70% (60-80 range) to equity investments and 30% (20-40 range) to fixed income investments. Trustees will maintain a cash allocation sufficient to cover the estimated amount needed to cover two years of authorized spending (endowment distributions) plus an allowance for music and memorial fund disbursements.

Trustees will review asset holdings at least annually and rebalance as necessary to maintain the investment allocation. The trustees may take action prior to the annual review should economic or market events dictate an earlier rebalancing.

Along with the annual or market driven re-balance, the trustees will revisit the policy and investment selection every two years to ensure that the portfolio is performing as expected.
Reviewed performance of current investments and decided to make a change

The funds have been invested in the Unitarian Universalist Common Endowment Fund for the past seven years. The Trustees completed a review of the UUCEF investment in March 2017. It was decided because of disappointing performance and high expenses to move the endowment investment from UUCEF to Exchange Traded Funds (ETFs). Trustees are in the process of selecting eight ETFs to provide an appropriate mixture of domestic and international equity and fixed income investments in accordance with the investment policy. Trustees believe the selected ETFs will provide similar diversification to that provided by UUCEF but at significant lower expense with the likelihood of better performance. The new investment structure is expected to be completed in May 2017.

Coordinated a planned giving seminar

The Trustees coordinated a Planned Giving Service and workshop presented by Rev. Laura Randall on October 16, 2016. Rev. Randall revealed a planned giving challenge being offered to UUA congregations and affiliate groups. Trustee Nancy Simpson-Banker has offered to chair a Planned Giving Committee to promote planned gifts at First Parish. While the committee will not be launched until after GA, Nancy has begun recruiting committee members.

The endowment currently consists of five funds described below

General Fund – Unrestricted fund consists of legacies, gifts, monies transferred by action of the Parish Committee, or actions by the church membership for the general support of the church.

Ministerial Settlement – Purpose restricted fund from the Fourth Century Fund capital campaign to provide financial assistance to our minister to purchase appropriate housing in Needham. Current note is to be settled upon sale of house or 180 days after our minister ceases serving as minister of FPC, whichever occurs first.

John Buehrens Fund for Ministry and Youth – Purpose restricted fund from the Fourth Century Fund capital campaign to support the salary of the intern minister and/or youth advisor. The Trustees recommended and the Parish Committee concurred that the spending formula adopted for the unrestricted fund would be used to determine the annual authorized spending amount.

Music Endowment – Purpose restricted fund to support initiatives approved by the music committee. From the FY09 Annual Report – “The Music Endowment Fund was set up in 1998 by the Music Committee as a permanent Fund whose purpose is to provide guest artists for the Sunday services. It is not part of the Committee’s operating budget, but augments that budget at the discretion of the Music Committee. The permanence of the fund is ensured by stipulating that only the annual income from the invested fund may be used, leaving the principal intact in perpetuity.”

Memorial Fund – Purpose restricted fund for memorial donations received by the church. The original purpose of the Fund was to purchase something that was needed and approved by the family of the deceased, the Memorial Fund Committee, and the Parish Committee. No limit as to how much can be spent from the Fund at any one time, but it has to be agreed upon by the Memorial Fund Committee, the deceased's family and the Parish Committee. The fund also contains donations for the Memorial Garden. The Memorial Garden/Window is self sustaining. The fund covers the expense of maintaining the garden, though volunteers do most of the work and provide most of the plantings.
## First Parish in Needham - Endowment Funds
### Consolidated - Cash, Investments, and Loan

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<th>FPC Pledges</th>
<th>Total</th>
<th>General</th>
<th>Buehrens</th>
<th>Memorial</th>
<th>Music</th>
<th>Ministerial Settlement</th>
<th>Period Perf</th>
<th>Qtr Perf</th>
<th>Ann Perf</th>
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<tr>
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<tr>
<td>Additions</td>
<td>17,893.65</td>
<td>9,025.00</td>
<td>-</td>
<td>8,700.00</td>
<td>325.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Withdrawals</td>
<td>(17,893.65)</td>
<td>(7,179.22)</td>
<td>(3,988.00)</td>
<td>(2,952.00)</td>
<td>(239.22)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Transfers</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Income / Investment Change</td>
<td>-</td>
<td>37,418.52</td>
<td>17,803.65</td>
<td>14,069.34</td>
<td>2,245.67</td>
<td>3,299.86</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Current Balance, 3/31/17</td>
<td>-</td>
<td>639,449.93</td>
<td>203,254.71</td>
<td>171,645.44</td>
<td>26,132.81</td>
<td>38,416.97</td>
<td>200,000.00</td>
<td>0.82%</td>
<td>3.47%</td>
</tr>
</tbody>
</table>

### Notes:
1. Withdrawals during the period related to FY16 distributions [paid in April 2016] in accordance to by-laws. CPI for period ended 12/31/15 was under 2% so the minimum distribution rate of 2% was applied to the market values of the General and Buehrens endowments at June 30, 2015.

2. FY17 withdrawals will be based on the CPI for the period ended 12/31/16 [2.1%]. Since the CPI is greater than 2% but less than 5%, Trustees will pay to the FPN operating cash account $3,910 from the General endowment and $3,300 from the Buehrens endowment based on market values as of June 30, 2016.

3. FPC pledges are typically stock donations cleared through Fidelity account. Stocks are sold as soon as possible after receipt. Occasionally a cash transfer is received. Transfers from the endowment cash to FPC operating cash clear the pledge amounts.

4. Asset holdings as of March 31, 2016 and March 31, 2017
   - Fidelity Cash Reserves: 19,047.52
   - Unitarian Universalist Common Endowment Fund: 381,138.11
   - Ministerial Settlement Loan: 200,000.00
   - Total: 600,185.63

5. UUCEF Performance (inception 7/1/2011)
   - As of March 31, 2017: 9.81% 2.41% 5.25%