Children’s Choir and UU Ringers at the Installation of Rev. Catie Scudera at First Parish in Needham, Saturday, May 2, 2015

Cover photo: First Parish Singers and Choir at the Installation.
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WARRANT FOR CONGREGATIONAL MEETING
FIRST PARISH IN NEEDHAM, UNITARIAN UNIVERSALIST

SUNDAY MAY 17, 2015 AT 7:00PM

From: Darren Zinner, 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 17, 2015 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 nominee for President.

As President – Gail Hedges
As Vice President - Don Leathe
As Treasurer – Erik Bailey
As Clerk – Darren Zinner
As at-large member – Eliot Jekowsky
As at-large member – Susan Smart
As at-large member for one year – Mary Ellen Menken

And to elect the following candidates for the listed positions:

For Nominating/LDC: Liz Rover Bailey
For Trustee: Nancy Simpson-Banker
For Auditor: Gray Brown

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

ARTICLE IV  To hear the report of the Treasurer and determine an operating budget for fiscal year 2015 – 2016.
ARTICLE V  To approve the Mission and Vision of First Parish in Needham as proposed by the Parish Committee:

Mission
The mission of First Parish in Needham is to create a welcoming, diverse, and compassionate religious community that celebrates the sacredness of all living things, nurtures lifelong spiritual and ethical growth, and works for environmental and social justice locally and throughout the world.

Vision
First Parish in Needham is a vibrant and inclusive congregation in which all are free to grow spiritually and ethically in a supportive community. First Parish offers a wide menu of programs and activities dedicated to:

- Transformative worship featuring inspirational music and multigenerational services.
- Religious exploration for all ages.
- Community-building activities and outreach for fellowship and support.
- Engagement with environmental and social justice initiatives locally and in the wider world.
- An active and engaged congregation that stewards First Parish in its mission with volunteer time and financial support.

ARTICLE VI  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 1 day of May, 2015.

Wendy Blom, President                        Don Leathe, Vice President
Erik Bailey, Treasurer                      Darren Zinner, Clerk
Kathi Cotte                                Marianne McGowen
Katie Edwards                               Jen Robins
Gail Hedges                                 Beth Sargent

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 1, 2015, 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: Darren Zinner, Clerk
MINUTES OF THE 2013-14 ANNUAL CONGREGATIONAL MEETING

MINUTES OF ANNUAL MEETING OF FIRST PARISH NEEDHAM

Sunday, May 18, 2014 AT 7:30 PM

The meeting came to order at 7:36 PM. 47 members were in attendance, which comprised a quorum of at least 15% of the membership.

Katie Lee lit the chalice and gave opening words.

A motion was made to approve the minutes of the 5/19/13 annual meeting. The motion was duly seconded and unanimously approved.

ARTICLE I

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

President, Wendy Blom: Wendy spoke of the transitions First Parish has gone through over the last year and expressed her appreciation for the Parish Committee which worked this year on the letter of agreement for minister, the transition to a life-long learning RE model and other items. She recognized Anna Berkenblitt and Leslie Melkin for their work on stewardship this year. The pledges for the next fiscal year almost reached the target. The church staff is top-notch and ready to smooth the way for our new minister. Wendy noted that First Parish will be sorry to say good-bye to Interim Music Director Roderick Phipps-Kettlewell. Other achievements for the year included the launching of a new website and database, the Youth Group’s service trip to New Orleans, the auction, the efforts of the Green Congregation initiative, the renovations using the Fourth Century funds which enables us to open our front doors, and the conversations regarding music led by the Transition Team. The Ministerial Search Committee found us a very strong candidate, Catie Scudera, and the Negotiating Team worked to formalize the relationship when she was called. Wendy is thankful for the First Parish community and is excited about the coming year.

Interim Minister, Katie Lee Crane: When Katie Lee first met with the interim search committee before beginning with us, she told them that First Parish had all of the resources needed to make good choices; we just needed someone to help us see what is already there. As our coach, she has listened, noticed things, and called attention to what we took for granted or didn’t notice. As someone seeing us with new eyes, she tells us what she sees. She stated that we have been an easy group to coach, leaping where she pointed when it seemed like a good idea. She was proud at the number of First Parish members who attended Catie Scudera’s ordination this afternoon. She noted that we recently received appreciation from the Mass Bay District for becoming a Fair Share Congregation.
ARTICLE II

To elect the following candidates as members of the Parish Committee for the upcoming church year:

- As President – Wendy Blom
- As Vice President – Don Leathe
- As Treasurer – Erik Bailey
- As Clerk – Darren Zinner
- As at-large member – Katie Edwards
- As at-large member – Beth Sargent

And to elect the following candidates for the listed positions:

- For Nominating: Phil Lynes
- For Trustee: Phil Murray

A motion was made to accept the slate as written in the warrant. The motion was duly seconded and unanimously approved.

ARTICLE III

To authorize the Parish Committee to appoint three delegates of First Parish to the General Assembly.

Wendy explained that the Article was mistaken and should state five delegates plus one alternate rather than three delegates.

A motion was made to authorize the appointment of three delegates. The motion was duly seconded and unanimously approved.

A motion was then made to amend this Article to read five delegates and one alternate, rather than three delegates. This motion was seconded and opened to discussion. In response to a question, Wendy stated that the people who have expressed interest in being a delegate are David Mecsas, Liz Rover Bailey, Ted Staley, Rebecca Keller Scholl, Marianne McGowan and Mary Valle. A suggestion was made to require the delegates to submit a report to the congregation after the Assembly. Wendy will ask them to do this.

The amended Article was unanimously approved.
ARTICLE IV

To approve the budget for Fiscal Year 2014/15 proposed by the Parish Committee and the Finance Committee

A motion was made to approve the budget and duly seconded. The discussion was led by Bob Denoble, Chair of the Finance Committee. The Treasurer, Chris Busby, could not attend the meeting due to an injury and Bob presented the Treasurer’s report in his stead.

Treasurer’s Report
Bob explained that First Parish’s income for the 2013/14 fiscal year was 100.8% of the budget, and expenses were about 91% of the budget. We therefore have a “net income” of about $41,000.00.

In response to a question, Bob explained about the change in fiscal year, which was approved last fall, and the “stub year” which will be May and June, 2014. He stated that because we operate on a cash basis, the fiscal years are really artificial; the most important thing is having money on hand to pay the bills. He expects that the stub year will show a surplus because many people pay their pledges now and expenses won’t be as high. That surplus will be rolled into the new fiscal year starting July 1st.

We currently have $117,723 in unrestricted funds available, and $61,224 restricted. Last year at this time it was $75,292 and $58,593 respectively. The restricted funds included the Fourth Century Fund, the remaining Betty May bequest, endowment funds and youth group funds, the last of which are in deficit because they are continually fundraising. Bob reminded everyone of Betty May’s very generous gift which contributed substantially to the Fourth Century Fund and, separately, went to operating expenses and allowed us to cover some deficits over the past couple of years.

Bob explained the purposes of the Fourth Century Fund, to do renovations, provide housing money to support the new minister, and an endowment for an intern. In response to questions, he explained that the housing support will consist of a loan to Catie, secured by a second mortgage on the house, to be repaid either when she sells the house or when she stops being our minister, with interest calculated in proportion to any appreciation in the house. If the house does not appreciate, the entire principal will nevertheless be paid back. The money would then be used for the same purpose for the next minister. In response to a question, Bruce Barnett explained that the loan is not completely risk-free because we are behind a first mortgage and there might not be sufficient equity to cover us if the real estate market crashes. In that case we would still have an enforceable promissory note and would have to decide whether to pursue its payment.

A question was asked if this housing support is in place of the regular “housing allowance” that ministers have. Bob explained that the minister’s compensation is $78,000.00. The IRS allows ministers to designate part of an income for housing, exempting it from taxes, and that’s usually what people are referring to when they call something a “housing allowance.” Catie will do that but the total is still $78,000. Katie Lee stated that that IRS provision probably isn’t going to last much longer anyway, and noted that the IRS considers ministers to be independent contractors who have to pay their own FICA taxes, although the UUA is voluntarily contributing to that right now. Jim Sargent, who works at the
UUA, noted that the IRS considers ministers to be employees with a special tax status, not independent contractors. Furthermore, the UUA feels that the housing allowance tax treatment from the IRS is not going to be changed in the immediate future.

The negative number in the Youth Group’s account was brought up. Erik Bailey stated that the fund is revolving, and as the new Treasurer he intends to get them off the balance sheet as a restricted fund because it does balance out in the end due to their fundraising.

**Budget**

Bob explained the general budgeting process, and noted that next year’s budget is $406,662, about $20,000 less than this year’s. Ministry is significantly less because there is no salary until mid-August; of course, that means there will be an increase next year as it will be for the entire year. RE’s budget is higher as is Music’s. Denominational Affairs is lower because our recent membership audit resulted in lower numbers, putting us in a lower category. Budget for Office went down because there is a new administrator working fewer hours, and also the ministerial search expenses are gone. The budget for Building is about the same, and Bob noted that it would be higher except for the solar panels which save us money on electrical. We have moving expenses for Catie budgeted at $5,000 but it probably won’t be that much because she is local.

Amy Cicala asked if there is money set aside for Catie’s office furniture. Bob stated that hasn’t been discussed, but there are contingency funds that could be used if needed.

Phil Lynes asked why we have an auction in the budget only every other year; since we have the auction only that often, why not spread out its income over two years? Bob stated that we have always budgeted its income only in the year it happens. The budget for the upcoming year balances without it; it contains only $1,350 in fundraising income. Bob does question whether that’s all the fundraising we can do and suggested looking into additional ways to raise funds.

A question was asked regarding if the pledge year is the same as the budget year. Bob answered that it doesn’t really matter since we are on a cash accounting basis.

Jim Sargent noted some differences between the budget shown on Bob’s slides and in the annual report. For instance, the report shows the Coffeehouse contributing only $6,500, when it really will be $7,500 as shown on the slides. Bob noted that the slides are more updated.

A vote was called and the motion to approve the budget was unanimously approved.

**ARTICLE V**

To conduct such further business as is necessary.

Wendy Blom noted that she has heard of rumors that the Parish Committee has voted to allow the Town of Needham to put a walkway through our property. She stated that the rumors are not true. PC has been discussing this but hasn’t decided anything, and such a thing would have to be brought to a vote before the membership.
The Bell Awards were given:

Wendy gave the first award to Bob DeNoble for the many hats he wears, as a member of the Ministerial Search Committee, the Negotiating Committee, his budgeting work, etc., etc.

Stating that the community in our church is one of the big reasons many of us are here, Erik Bailey gave the award to David Mecsas and Kim Lorimier, recognizing their work on the new website and database which help bring that community together.

Katie Lee Crane gave the award to Phil Lynes and the Continuing Education Committee, of which George Rappolt was also present, for their work in helping establish a lifelong learning program and taking over the huge job from John Buerhens.

Marianne McGowan gave the award to Ellie Valle, who has shown courage and leadership by educating peers regarding transgender issues and showing us how to support them.

There was no further business.

A motion was made to adjourn, duly seconded and unanimously approved, and the meeting was adjourned at 8:54 PM.
RITES OF PASSAGE

NEW MEMBERS

Marion Lebourseau  Bill O’Keefe  Jessie Bowen
Susan McGarvey  Liz Campbell  Marguerite Robbins
Melanie Guarrera  Kim Hokanson  Cindy Fung
Matthew Guarrera  Vincent Cho  Will Rico
Seamus McGovern  Yvette Lillge  Kari Hong
Nancy Temple  Peter DiMarizio  Karyn Ridgeway
Ada Suydam  Kitty Sahin  Hogie Fitzgerald
Dana Robinson  Michelle Dhanda  Katherine Fitzgerald
Laurel Davis  Rahul Dhanda
Ann Gildea O’Keefe  Jonathan Tholl

Total membership as of 5/6/15: 262

DEATHS & MEMORIALS

John Mark “Chip” Thomas II  Shirley Howard  Christine Crocker
Richard “Dick” Remnitz  Roberta “Bobbie” Nelson  Marianne Hudec
Grace Johnson  Meredith “Merry” Reis  Margaret Gotthardt
Mary Boyle  Nick Johnson  Suzon “Suzie” Lowe

The congregation also memorialized Barbara Goodenough, a local teacher and TV host whose family sought a Unitarian Universalist church for her funeral. We also mourned with many First Parish families at the loss of their close family members and friends.

MARRIAGES

Kate Loftus-Campe and Rich Loftus

We were delighted to host the wedding of our assistant music director to her fiancé on October 25, 2014, at which ceremony many First Parish members attended, volunteered, and sang; our former intern, Rev. Christian Schmidt, officiated. Rev. Catie also officiated the weddings of Kathryn and Ben Crawford (the latter of whom grew up in Needham and whose parents contacted Rev. Catie after reading about her in the Needham Times) and of Sarah and Alex Ramos, her personal friends from seminary.
BIRTHS AND DEDICATIONS

Shayla Elizabeth Lilo Rivard

Shayla was born on August 13, 2014 to our congregants, Tara and Jeffrey Rivard, and we dedicated her on April 12, 2015. We also dedicated two children of “graduated” youth group members: Margaret Rice, daughter of Carrie and James Rice and granddaughter of Agnes and Don Leathe, on Christmas Eve 2014; and, Lucy Remnitz, daughter of Dan Remnitz and Kate Woods and granddaughter of Fay Remnitz, on March 8, 2015.
PRESIDENT’S REPORT
by Wendy Blom

Parish Officers: Wendy Blom, President, Don Leathe, Vice President, Erik Bailey, Treasurer, Darren Zinner, Clerk

Parish Committee Members: Kathi Cotte, Katie Edwards, Gail Hedges, Marianne McGowan, Jen Robbins, Beth Sargent

The Parish competed its transition to a new minister and music director this year. It has been a year of excitement, with many new members, new social activities, more diverse music, and a new outlook on the future. At a Parish Committee retreat led by Karen Bellavance-Grace from the UUA in early October, the Committee got to know Rev. Catie Scudera better and began evaluating our existing programs and setting some Committee goals for the year. We created a covenant for our work with Catie. We also decided to review the previous mission and vision of the Church and create a new strategic plan for the next five years.

To develop the new Strategic Plan, the entire Parish brainstormed goals for the Church. The COM organized a multi-generational group activity during a Sunday service to gather thoughts on what First Parish offers and what direction people want to see it take. We also held discussion groups and put out an on-line survey. The result was a tremendous number of good ideas that the Parish Committee’s Strategic Planning Sub-Committee sifted through to come up with aspirational goals.

A new Committee on Ministry was formed to contribute to an annual evaluation of the Minister and to assess the strengths and weaknesses of the church throughout the year.

In collaboration with the Property Committee, we explored the possibility of hiring a part time sexton. We determined that if we let our current cleaning company go, we could afford to hire a cleaner and a sexton for 8 hours/week each. This is meant to alleviate some difficult problems with building maintenance and social hour requirements. The new staff should be in place by June 1.

Financially, the Church weaned itself from balancing the budget with a one-time bequest. Our FY2016 budget is self-supporting with income from pledges, building rentals, fundraising, and investment income. This was important to all of us on Parish Committee. We can thank the budget drive committee led by Dave Mackey for rethinking the process of soliciting pledges and running such a successful campaign.

Parish Committee followed the advice of Religious Exploration Director Mark LaPointe to expand his position to oversee Lifespan Religious Education. He now works with the Adult Education Committee to coordinate all education programs. Parish Committee also accepted the Property Committee’s request to update all the lighting at First Parish through an NSTAR program. This will result in big electric bill savings and comes with a substantial NSTAR rebate for the work. We are so proud of our energy efficient building!

It has been an honor and a good deal of fun to work with the incredibly dedicated and talented people on Parish Committee and on our other vital committees. I can’t begin to list the many people who have made First Parish sparkle this year. I feel fortunate to be part of such a dynamic and supportive religious community. The Church has great momentum and I and look forward to what will develop in the next few years.
MINISTER'S ANNUAL REPORT
by Rev. Catie Scudera

We have just passed the first anniversary of my call to this fabulous congregation and our wonderful installation ceremony in celebration of our new shared ministry together. Finally, we have come to the spring, after an exceedingly difficult winter for our community. We have struggled through many deaths, a break-in, and logistical challenges due to an aging phone system, ineffective wifi system, and nine feet of snow. I am so proud of this whole community for coming together to support the church and one another through the process of transitioning to a new minister and music director, and through these trying times. In addition to members of Caring Crew, Pastoral Care, Property, and the extended Worship team, Susanna Whitman deserves much praise and gratitude for her behind-the-scenes work; and, much praise and gratitude is thus also due to all those who covered the office for her during her surgery and recovery time, and helped her catch up when she returned.

My focus this year has been on relationship-building and learning more about First Parish and the wider community. Of course, a major touch-point has been Sunday worship, where we reaffirm our covenant with one another, offer compassion and rejoicing through sorrows and joys, and explore new ideas, ancient history, and our deeper selves. I am so appreciative of the Music and Worship Committees for journeying and collaborating with Irina Georgieva and I in our first year at the parish. Mark LaPointe and Kate Loftus-Campe have also been invaluable partners through this first worship season.

I co-developed special covenants with the staff and the Parish Committee, which we review regularly to ensure that we are in “right relationship.” I’m very proud of and honored to work with our talented First Parish staff and Parish Committee. I’ve visited or collaborated with many (if not most) of the committees of the church, all of which are eager to improve and challenge themselves for the benefit of the whole congregation.

I’ve enjoyed jumping into old traditions, such as the kick-off family pool party, the holiday carol-sing, the Lyceum series, and the youth group service trip. I’ve loved our revived traditions, including monthly “Lunch Bunch” get-togethers, the First Parish Passover Seder, semi-annual membership review meetings, and the talent show. And, I’ve been impressed with the initiative of First Parish members and friends to bring to life new programs, like our Neighborhood Groups and many adult education opportunities.

With the assistance of First Parish members and the Needham Clergy Association, I have also gotten to know the town of Needham better. I have met with staff of the Needham Community Council, Needham Community Farm, and the public schools’ guidance department, and volunteer leaders of various town committees, the League of Women Voters, and the Coalition for Youth Substance Abuse Prevention. I’ve had the pleasure of working with other clergy and professionals in town, including Gloria Greis from the Needham Historical Society and staff members at Eaton’s Funeral Home. In my pastoral work, I have visited members and friends at local senior living facilities, including North Hill and Newbridge, and local hospitals, including “the Glover” (BI-Needham), BIDMC, and New England Baptist. At Representative Denise Garlick’s invitation to the Needham Clergy Association, I also participated in a tour of the State House and a meeting with local state representatives. And, the town got to know me better through a lovely interview published in the Needham Times.

But, one of the best ways I’ve built relationships this year is through household visits to members and friends. By the writing of this report, I have contacted 158 households and visited with a significant
proportion of them—occasionally, I have not heard back from a family or individual I’ve contacted, and I will circle back to those folks a second time in the fall. I have 58 families remaining on my list who I plan to contact before the end of June. I will be in touch with our new members from the 2014-2015 church year next fall, and will continue my visits with new individuals and families as they join the congregation. Thank you all for your openness and hospitality in sharing your stories with me!

We’ve welcomed 27 new members and their children into the congregation. This is an incredible number, and a testament to the warm, welcoming quality of our whole congregational community and particularly the good work of our Membership Committee. Our total membership is now at 262 adults (with over 100 kids and teens registered in our religious exploration program).

It has been a joy working with the Parish Committee and Committee on Ministry on future dreams and goals for the congregation, which President Wendy Blom will speak to in detail in her written and verbal reports. We heard ideas for expanded adult continuing education (including Small Group Ministries and spiritual practice groups), a stronger and wider commitment to social justice, a better-funded music program, a more integrated, multigenerational, and welcoming community, more social and artistic events, and more. The Parish Committee has reviewed and condensed just a handful of major goals for the next five years, and we hope the whole congregation will get behind helping those dreams come to fruition.

Part of making any of those dreams come through is a more robust annual budget and a sturdier endowment. Our Budget Drive team—Katie Barnett, Nancy Wilde, Darren Zinner, and led by Dave Mackey—raised significantly more pledges and donations than ever before. We also had a very successful April campaign to add onto our music budget, with $3,000 worth of pledges collected just the first Sunday. We are indebted to the Budget Drive team, and to the overwhelming generosity of our long-time and new members and friends. When the Fourth Century Fund wraps up this spring, we will also have a substantial endowment to support our youth and intern ministry programs. It is my hope that over the next few years, we will move even closer to a healthy giving distribution and create programs to add to our endowment.

Social justice has been a major point of interest and action this year. The Social Action Committee has been in a period of discernment, and with enthusiastic support from the Green Congregations Committee, I hope we will effectively inform and excite the congregation with the UU Commit2Respond program as our next social justice endeavor. We hoped to take a vote on the program at this Annual Meeting, but at the request of the Parish Committee, we will schedule more informational meetings and sessions in the fall so that the congregation is fully informed of what Commit2Respond requires. Before the United Nations climate conference in November 2015, we plan to have a congregational vote on the Commit2Respond program “requirement”: showing congregation-wide efforts to shift to a low carbon future, grow the climate justice movement through public education and witness, and partner with affected communities to advance climate justice. Next year, I also hope to see a revived Welcoming Congregations program, and the newly-formed Racial Justice Task Force inviting the congregation into hard, but important, discussions about race and racism in America (and in our town) as well as continuing their relationship-building with local anti-racist organizations.

I have been proud by the numbers of First Parish members I already see engaged in justice in the larger community, through Town Meeting and town committees, local charitable and justice organizations, and events about race and racism (for example, the Needham Diversity Summit and a Black Lives Matter
First Parish in Needham was also considered a “sponsoring” congregation of the 75th anniversary celebration of the Unitarian Universalist Service Committee (UUSC). Susanna has noted to me that when we give away our offering plate, we often collect 25-50% more funds than when we keep the plate for our own budget. This is a congregation invested in social justice and charitable work, and I hope our commitment will continue and expand.

I know that growth is a priority for our congregation. I see this as a very healthy impulse: our congregation is a special, warm, inspiring community, and we want to invite more people into our wonderful community! But, it is my prediction that we will not and cannot grow much larger than we are now, unless we make changes in how we do worship, how we integrate and retain our members and friends, and how we structure our adult-focused committees and learning opportunities. For example, we are too full on Sunday mornings for most newcomers to feel welcome—the common rule on that is if a sanctuary is 80% full, visitors feel that they won’t be able to find a seat for themselves… And sometimes, they literally can’t at First Parish! I don’t have a predetermined idea of how we will fix this space problem—there are many options we can study from other congregations—but I am confident that through careful discernment from staff, lay leadership, and the whole congregation, we will find a solution that feels exciting and promising to everyone.

In my ministry beyond our town parish, I served as the recently-ordained liaison at the Ministerial Fellowship Committee (MFC) during their September 2014 meeting. I have been invited to give a presentation at this year’s General Assembly, partnership with former intern Rev. Molly Housh Gordon. Our presentation is called “Mary Safford is My Homegirl” — stay tuned! I am delighted to share that I have been nominated to the Board of the Unitarian Universalist Partner Church Council (UUPCC). I am very excited to join the UUPCC team, and will be happy to share more about their programs with First Parish. I have also participated in three local community events: the Needham Thanksgiving interfaith worship service, the Needham MLK Day Celebration, and the United Nations’ Gift Box unveiling ceremony in Boston.

I have been blessed to further my ministerial training by attending many conferences and workshops this year; of particular note are the CENTER Institute for Excellence in Ministry (during which I studied church structure and culture with Rev. Jacqui Lewis), the Mass Bay Ministers retreat (during which we studied climate change and maintaining a “hopeful heart”), and, coming up, the First Year Ministers Retreat at UUA headquarters, and then Ministry Days and General Assembly in Portland, Oregon.

After a great first year with all of you, Irina and I both are ecstatic looking to 2015-2016, when we will have done almost everything with you at least once! I will be returning to First Parish for start-up work on August 17, after taking three weeks of vacation with my spouse in Europe and four weeks of study leave, including a retreat at Thich Nhat Hanh’s monastery in New York. See you at Ingathering Sunday!

Blessings,

Catie Scudera
REPORT OF THE DIRECTOR OF LIFESPAN RELIGIOUS EXPLORATION
By Mark E. LaPointe

Respectfully submitted on April 21, 2015
By Mark E. LaPointe, Director of Lifespan Religious Exploration

As I round out my fourth year at First Parish in Needham, I am so impressed with the work we do and the strength of so many of our programs. I’m especially proud of the many great volunteers involved in Religious Exploration for children, youth and adults. This is easily the largest volunteer effort in our church with upwards of 60 people working to bring us our weekly RE program for children as well as educational opportunities for youth and adults. To the many of you, too many to name, who do this vital service, thank you!

As you may know, this year is the first in which I’ve taken on the additional role of Lifespan Religious Exploration, working across all ages and groups within the church to provide leadership and administration over a variety of programs, to support and enhance currently successful work, and to introduce new programs, initiatives and procedures. This has been a transitional year into the role, connecting with the key people and programs in play at First Parish and working to support some new programming for adults and families. Perhaps the largest challenge has been in getting a broader vision of religious exploration as it relates to the overall mission and goals of First Parish. As you create your shared vision for the next five years here, I plan to initiate a look at Lifespan RE to see how well it fits within that vision.

Below, I’ve highlighted a number of our program successes this year and have highlighted what I see as future issues or challenges as we continue to grow in a healthy, sustainable way.

Children’s Religious Exploration (RE)

One of the greatest signs of success in our Sunday School program is in the enrollment. This year, we’ve seen an uptick in both registration and participation with roughly 105 children and youth now engaged in some aspect of our church school. Most of our Sunday classes are using the UUA’s Tapestry of Faith curriculum which works well for a church school like ours (with segmented PS-8th grade classes). We depend upon 40 volunteers to teach these classes each year and successfully recruit about 80% of our teachers with relative ease. The remainder is a bit difficult. My hope is that a number of our newer families will be ready to step into the role this fall.

The RE Committee has spent a good portion of this year creating a set of goals for our curriculum, updating those that have been in place for a good 10 years at this point. You can see the results of this work in their annual report, but I am happy to note that these guidelines are very tightly aligned with the overall ethos of First Parish and that we are in consensus about the need to promote our Unitarian Universalist identity, history and values more clearly and consistently.

Going forward, I will continue with teacher support initiatives which, unfortunately, often take a back seat to other, more urgent concerns. This year, I did offer an initial training opportunity for new teachers which I will repeat before we break for summer and I am putting together a workshop on how to implement social justice projects into the classroom, another RE Committee priority. This is helped by some wonderful “project in a box” kits created this year. Although unusually small 2nd and 8th grade classes have alleviated our room crunch, this issue is likely to emerge again in the future, especially as the church continues to grow.
On a final note, our second year of our Milestone programs seems to be progressing well. I tweaked things just a bit around timing and the level of independence/interaction based on some feedback I received from last year’s participants. We currently have three second graders on track to finish the Chalice Keepers program and the 5th graders will complete the UU Seekers program in the fall.

**Youth Programming**

Our youth programming begins at 6th grade and includes three years of regular RE classes as well as junior and senior youth groups. Youth begin this transition period with our Neighboring Faiths class, then move through OWL and Coming of Age. 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 Libby Schap in her second year as Youth Program Coordinator. She continues to make some wonderful adjustments to the program and is working on a plan for next year that will include an emphasis on social justice and an enhanced spiritual exploration component. Priscilla Mullin continues to serve as our lay advisor with Tony Cicala and Reverend Catie stepping in regularly.

At the time of writing, this year’s Youth Group service trip is currently underway. The youth are in Eastern Tennessee where they will focus on environmental work with the National Park Service. They’ve done a great job fundraising this year and I am grateful to YAC chair, Kristin Neff and Libby Schap for some wonderful planning.

**Adult Exploration**

Our Adult RE programs are very successful and are well managed by a number of volunteers in a number of different capacities. The Continuing Education Committee is responsible for our successful cornerstone program, the Needham Lyceum, which has brought in a wonderful array of speakers this year. They also manage evening films, including a multigenerational film/potluck focused on equity attended by more than 50 people. In addition, we have ongoing programs like Positively Aging and special offerings such as this year’s workshops with Eliza Blanchard and Laurel Hallman that help to bring spiritual practice and care to our community in different ways. Reverend Catie and I taught a three-part workshop on Stories from the Torah that was a wonderful venture tied into the Jewish themed month of activities and worship.

With a year under my belt, mostly spent in observing and peripheral interaction with our adult programs, I see a couple of key areas for improvement that I will work on going forward. First of all, we do lack (at times) in some coordination across program areas and I think we could streamline our Adult programming with some additional effort and an alignment around our congregational goals. Further, while not surprising, we do need some coordination around promotion, scheduling and communication that I plan to work on in the coming year. We have an abundance of rich programming, but I don’t think that it is always as visible as it could be. We do have a need for some new programs as well and I am working on plans for a series of transition programs (retirement, empty-nesting) and on continued efforts to bring Tapestry of Faith curriculum to the adults at First Parish. Finally, I plan to help the Continuing Education Committee to grow its membership and to focus its own goals in the year ahead.
Family Programming

One of my biggest accomplishments this year has been in the revitalized Parenting Your Children (PYC 2.0) program. Percolating over the past couple of years, this program is a wonderful opportunity to build both support and social connections for younger families. With both open discussion and more formal presentations, the monthly gathering is particularly important for newer members of the First Parish community. Plans are to continue the program with regular, sustained support from me and with an eye toward growing the program more fully. I’m grateful to Katie Edwards and Liz Campbell for working with me on the PYC Steering Committee.

We’ve also had a number of wonderful family events this year including the revised First Parish Seder and the great Karaoke Night sponsored by the RE Committee. I will continue to encourage and support these annual events as they arise.

First Parish Integration

A large part of my work this year has been around themes of integration. Working with a new minister closely (as well as the rest of the staff) is both rewarding and a bit time consuming. Although the time is very well spent, a major element of this year has been to collaborate with and support Reverend Catie Scudera in our shared ministry. Working closely with her on worship has been rewarding and I believe the elements we bring to that work play out well for the congregation, perhaps most notably in the Time for All Ages and Multigenerational Worship plans for which I have significant responsibility. I appreciate that she’s encouraged creativity such as the “play doh” exercise I introduced in March and that we’re continuing to fine tune our work. It was also quite a joy to work with her on other programs such as the Racial Justice Task Force and the “Stories from the Torah” class we co-facilitated. I’ve been fortunate to work with three great ministers in my short time at First Parish and am confident that Reverend Catie and I will continue to have a great working relationship that benefits the church in numerous ways.

As a part of this overall theme, I’ve also tried to be a presence (physical when possible) in a wider range of areas and with committees whose work overlaps that of Lifespan Religious Exploration. I’ve worked more closely than ever with the Worship Committee, YAC, Continuing Education and Membership. As noted above, I’ve also played a key role in the emerging Racial Justice Task Force and PYC 2.0 programs and plan to provide further leadership as we seek to revise our Welcoming Congregations Task Force to take on a 21st Century approach to diversity in our congregation. My March 15th sermon on “Beyond the Binary” was a signal to the congregation around my commitment to these areas of ministry. I see them as vitally important to a healthy RE program for children as well as the broader church community.

Next year, I will work with my wonderful colleagues and a number of volunteers on two very important initiatives – Welcoming Congregations and Safe Congregations. Both areas are in critical need of attention and in both of these areas I can provide some expertise and leadership.

Professional Development

On a final note, I’ve been representing First Parish in the broader Unitarian Universalist movement through some of my professional activities this year. Serving as the Vice President of the North Atlantic Region (NARL) of the Liberal Religious Educators Association (LREDA) has allowed me to interact with a number of colleagues from churches throughout New England. We share best practices, support one another’s work and look for opportunities to collaborate. In this capacity I helped to plan the annual NARL retreat last month in New Hampshire where the theme was “From Scarcity to Abundance.” I am
also currently engaged in the credentialing process whereby I will earn Master’s level certification in Religious Education granted by LREDA and the UUA. This involves study and course work as well as a final project that I’ll complete in 2017. I recently completed a course in “Administration as Leadership” and am about to take another in “Teacher Development.” I think it says a lot about my work at First Parish and my leadership that I’ve been asked to mentor three emerging DREs in the area, two of whom are helping their congregations through difficult transitions.

I apologize for the lengthy report. Our Lifespan RE program is thriving and healthy and also covers a whole lot of ground! Much gratitude to all of you for providing me with a wonderful working environment and a community so full of love and commitment to our important shared ministries.

In peace,
Mark

REPORT OF THE MUSIC DIRECTOR
by Irina Georgieva

During 2014-2015, the music program at First Parish involved a large number of Parish musicians, regular guest performers, and four Parish groups. Our main goal has been to provide varied music for the varied tastes and needs of the congregation. First Parish staff and Music Committee have been helping the open conversation about music between parishioners and musicians.

First Parish Choir resumed regular Thursday night rehearsals in September and contributed to the themes of the services by providing anthems, musical meditations, and occasionally, offertories. Some of their repertoire during 2014-15 includes: Prayer of the Cat by Ivor Davies for the Blessing of the Animals service, Walk the Roa’ by Kate Rusby for Columbus Day/Indigenous People day, the Khasi hymn, Burum Burum for the service, focused on the history of Khasi Hill, Do you Shine by Nick Page for the service celebrating the First Parish anniversary, Simple Gifts by Aaron Copland for the Thanksgiving service, The traditional French carol Joseph from On High was Wed, Christmas Lullaby by John Rutter, and an arrangement of the traditional German Carol Maria wanders through the thorn for the Advent and Christmas services.

The traditional French carol Joseph from On High was Wed, Christmas Lullaby by John Rutter, and an arrangement of the traditional German Carol Maria wanders through the thorn for the Advent and Christmas services.

First Parish Choir collaborated with the Choir of the First Unitarian Society in Newton, and the Dedham for two performances of Mozart, Requiem. This project helped establish a musical connection between our churches. Choir members participate in community singing events organized by churches in our area.

First Parish Singers under the leadership of Jim Sargent participated regularly in the services, often providing music requested by Rev. Catie Scudera. Their music enhanced the message of the sermon. Their repertoire was very comprehensive repertoire included Pompeii by Bastille, Gracias a la vida by Violeta Parra, Country Nation by Brad Paisley, No Man’s Land by Eric Bogle, Deportee by Woody Guthrie, Bread and Roses by James Oppenheim, Sheep go to Heaven by Cake, For every season/Turn, turn by Pete Seeger and many others.

The members of the First Parish Children’s Choir have continued to grow musically under the direction of Kate Loftus-Campe. Their confident participation in the Sunday services has brought much joy to the parish. Kate founded a new ensemble early in the fall: the First Parish Ringers. She rehearsed with them weekly and arranged for them a large variety of music, including hymns. Her experience as a ringer and her love and dedication to the children at First Parish has helped the youth music program flourish.
First Parish is fortunate to have many musicians who have continued to contribute to the music program. The First Parish congregation is fortunate to have a lot of musical talent among its congregants. Sue, Kim, and Abby Lorimier have contributed with beautiful performances during several services. Zoe Bailey played during both Christmas services, Jim and Beth Sargent and First Parish Singers perform regularly on Sundays and their music is very closely related to the themes of the services. Eliot Jekowsky participates in the music program both as a flutist and a sax player. Wendy and Dave Blom have played in various settings, from trio to larger ensembles. Ross Donald organizes drum circle events during which he involves congregation members that are interested in music but don’t necessarily have formal musical training.

PARISH ADMINISTRATOR’S REPORT
by Susanna Whitman

This is my second year at First Parish in Needham. Below is the range of what I do, as many people do not realize how wide-ranging and all-encompassing my work is. It’s good for you to know what to expect, what I do and how well. A feature this year has been the great number of wonderful volunteers who have stepped up to do ongoing or one-off projects and tasks. I am heartily thankful to you all for your service!

Summary of goals and accomplishments set at the start of the year.

- **Goal #1 QuickBooks Training**: During my hiring interviews here, the search committee knew that I had not previously used QuickBooks. I had managed multiple account lines, but had not been the bookkeeper. The Parish Committee supported my need for training and I took a free online course from the National Bookkeeping Association and purchased an online course to consult as needed.

- **Goal #2 Learn what committees need from me for financial reporting**: This did not end up being a focus for this year as, with a new minister and new music director on staff, programming was very full and this did not receive much attention. New committee chairs can let me know what they need.

- **Goal #3 Prioritize/delegate tasks of job description** – This year, I have had wonderful help from volunteers with: collating orders of service, a fantastic trio of pledge mailing collators, a group of volunteers for office coverage for attending professional meetings or time out of the office for medical appointments, another group of volunteers serving as event facilitators. For back up I have several people who could format and finalize the order of service, if need be.

Other accomplishments

**Teamwork and Human Resources (HR) work**

- A primary goal this year was to form our new staff team, and we each played a part. A team is always new when someone joins or leaves, and we had two new members of staff this year. We are working well together and are committed to our mutual success.

- Fulfilled Human Resources on-boarding of two new members of staff, Rev. Catie Scudera, and our new Music Director, Irina Georgieva. When they started I had benefits and orientation packets ready, and credit cards ordered and ready to use.

- This Spring we are hiring two new positions, Sexton and Cleaner, who will report to me. Many thanks to our volunteer committee working on the hiring process: Eleanor Rosellini, Mary Ann Oldfield, and Ed Quinlan. I will be producing packets for the new staff and orienting them.
Together with all colleagues, new and continuing, we developed/adapted successful ways of working.

I oversee the administration for staff benefits and payroll. I work closely with Bruce Barnett our superb HR volunteer, who oversees this work.

Recruited office volunteers to collate mailings and cover when I am away from my desk for the day, and another group who rotate week by week collating the order of service and announcements.

Financial Work

As the congregation’s bookkeeper I have ensured timely entry of income and transfers, and timely payment of invoices. I am very grateful to Bette Gosule who assists with the income side of the work with consistency, accuracy, and good nature.

I have improved the system for logging online income. This year it is more streamlined and reliable.

Beginning in January office hours were reduced on Tuesdays and Thursdays to 12 – 2 PM, although my hours have not been reduced. This change is to promote much needed quiet concentrated time to accomplish essential financial work. Monday, Wednesday, and Friday office hours remain 9 AM – 2 PM, as they were last year.

At the recommendation of the Trustees, we have set up new processes for tracking and for transferring funds to and from the Trustees account and the church checking account.

I work closely with Treasurer, Erik Bailey, to ensure checks are signed and that he and Bob DeNoble have the figures and information they need for their roles.

I have learned more of QuickBooks, our accounting software, and took an online course.

Quarterly pledge mailings were sent out in October (status statement), January (tax year statement), and April (status statement). Many thanks to the helpful, cheerful volunteer pledge statement collating and mailing crew: Gail Hedges, Kathi Cotte and Katie Edwards, who ensure it all happens as needed.

I conducted the annual required Payroll Audit for Church Mutual Insurance Company.

Weekly, I process Sunday plate collections for deposit.

I provide basic financial education to colleagues and volunteers as can and as needed. In turn, I am also learning more about financial processes and best practice.

Technology Improvements

In late Winter, I oversaw an upgrade to our wifi, which has improved connectivity in meetings and RE classes. RE curriculum is free and all online so it requires wifi.

Mark LaPointe’s (DLRE) computer was due for replacement this year and we got an excellent deal on a good quality new machine. We will move his old computer to the volunteer desk where the computer needs replacing.

I purchased a new wireless printer which Tony Cicala very helpfully installed. In addition to being easier for our staff members with laptops to use, it has also enabled us to make name tags again as the previous printer stopped functioning. (The copier produces great quality, is fast and very reliable but does not make name tags.)
We have a volunteer, Paul Rooney on the Property Committee, who has made our existing phone system function as needed. This saved the congregation the purchase of a new system. He has been trouble shooter for the phones and fax, making them consistently reliable.

**Worship Work**

- In addition to producing weekly orders of service, I produced two orders of service each on Christmas Eve and on Easter. And for the Minister’s Installation a 12-sided orders of service was produced.
- I have provided various sorts of arrangements and support for Sunday worship and for memorial services’, including recruiting audio visual assistance, booking rooms, help with staging, and more.
- Many thanks to the new group volunteers who rotate weeks collating orders of service and announcements. Betty Byers, Kathi Cotte, Gail Lehman and Suzanne Pelton.
- On a spreadsheet I track weekly attendance at Sunday worship.

**Work with Committees and Groups**

- Supporting various Committees including Archives, Membership, Music, Pastoral Care Team, Parish, Property, Worship, and others in finance, scheduling, documentation and other administration.
- This year I learned more about Realm, our database which we introduced last year. It is used to track income, membership, and committees and groups can use it to work together on projects. I encourage you to use your profile (to update info and track giving) and your groups to enjoy coordinating with one another. Let me know how it goes. Sometimes we can get the company to tweak things for us.
- Additional Realm work included:
  - Entering new members in Realm.
  - Sending password reset and new invite emails.
  - Encouraging individuals, committees and groups to use Realm for their FPN activities.
- I provided support to the Annual Stewardship Campaign Team by entering pledges in Realm in a timely way to enable tracking and providing info as needed.
- Producing the Annual Report, which has taken several weeks, including soliciting individual reports from contributors, collecting them into one document and formatting.
- I maintain church records by electronically filing the minutes of church committee meetings, as well as other church record documentation.

**Property – Building and Landscape related work**

- In the year since the 2013-14 Annual Meeting we have had a new group of weekly or monthly renters. Rentals and inhouse bookings on calendar – very busy year. These include an Al-anon group, a Russian Children’s Choir, a divorce support group, and a men’s support group.
- Timely inspections of elevator, chair lift, boiler, fire safety system, and fire extinguishers were ensured.
- Coordinated snow removal from grounds and roof during a record-setting Winter. Developed a rentals cancellation policy for cancellations due to weather or other unavoidable events.
- Keeping kitchen, office, and cleaning supplies stocked by ordering as anticipated.
Daily I respond to building needs as presented by Needham Children’s Center, Ballet school, property committee, staff, etc. Needs range from electrical, plumbing, heating and cooling, inspections, etc.

Respectfully submitted,

Susanna Whitman
Parish Administrator
COMMITTEE REPORTS

ARCHIVES COMMITTEE

Committee Chair: Jeanette Anderson

Committee Members: Buffy Duhig, Muriel Gehman, Shirley Pratt

Mission Statement: Our mission is to collect, maintain and safely store any material of continuing historical interest to First Parish. Through periodic exhibits of the materials in our collection, we try to interest members in our 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.

Summary of Goals and Accomplishments:

September, 2014: First Parish was one of the sponsors of the Needham Historical Walking Tour. The Archives held an open house from 12-3PM.

October, 2014: The Archives Committee met with Gloria Greis, Director of the Needham Historical Society and the Rev. Catie Scudera. Dr. Greis was able to help us with the next steps in our efforts to organize our documents for an eventual on line index.

November, 2014: In honor of our founding in November, 1711, the Archives Committee held an exhibit of old church silver, dating back to the Reverend Jonathan Townsend and the Reverend Stephen Palmer.

November, 2014: The Archives Committee provided background material to Ed Lane for his Lyceum talk on the Reverend William Ritchie (1821-1842), the first minister from our church who affiliated himself with a group of Unitarian ministers in Boston.

Spring, 2015:

Our thanks to Shirley Hutchins of Walpole who gave First Parish a silver plate coffee and tea set.

April 2015: The Needham Historical Society is celebrating its 100th Anniversary with an exhibit, 100 YEARS IN 100 THINGS. First Parish was asked to participate and loaned a silver porringer and spoon belonging to Mary Sugars Townsend, wife of our first minister, the Rev. Jonathan Townsend (1720-1762).

2014-2015: Buffy Duhig has headed an almost two year project to update our Memorial Book. Lists were compiled of dedications and marriages; following the practice of other churches, this information will be in one book. Our thanks to Buffy for a painstaking task.

Looking ahead — preliminary goals and issues for next year

To participate in the Needham Historical Society Walking Tour in the fall of 2015.

To continue organizing documents into an index for on line access.

To organize an exhibit of the old Bibles belonging to First Parish, some dating back to the 16th century.

To update our collection of Bellmans, Orders of Service and Parish Committee Minutes.

To exhibit during coffee hour, our updated Memorial Book.
COMMUNICATIONS COMMITTEE

Committee Chair: David Mecsas
Contributors: Emily Weiland, Kim Lorimier, 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:** Continue on-time delivery of:
  - 11 issues of the *Bellman*,
  - 50+ issues of *Bell Notes*
  - Updates of www.uuneedham.org at least once/week
  
  **Progress:** Done. Emily Weiland has taken over every-other-week production of the *Bell Notes*, and a plan is in place for someone else to take the alternating weeks from David Mecsas. Emily has also taken over much of the updating of uuneedham.org.

- **Goal:** Continue to produce and place media notices promoting FP activities and news
  
  **Progress:** Mostly done. Coverage slipped in the Fall due to external circumstances, but we have identified a new person to take over this duty.

- **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, and integrate the new minister's vision for parish communications. Possible using a consultant.
  
  **Progress:** Some discussion, including identifying a potential keynote speaker, but little real progress. Will keep on list of Goals for next year.

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

- **Goal:** Continue to improve uuneedham.org
  
  **Progress:** Fortunately the new website has not required any major work. The biggest change was moving our website hosting from hostmonster to hostgator. This was done primarily because of issues with email hosting at hostmonster, but it also addressed some performance issues (speed).

- **Goal:** Focus more specifically on social media, especially:
  - Improving our Facebook page and feeds
  - Developing a more robust blog, with multiple contributors

  **Progress:**
  
  o **Facebook:** Good progress. Kim Lorimier recruited several people to post items. We need to stay disciplined about posting regularly, but the page is updated regularly.
First Parish blog: Although we did not follow through well with a formal schedule of posting, we have had 54 posts in the last 11 months, meeting the goal we set of a post/week. Rev. Catie and DLRE Mark LaPointe have been contributing monthly; in addition 13 individuals wrote one or more posts, and the Racial Justice Task Force submitted one post.

- **Goal:** Continue to work with other committees to optimize First Parish's use of the Realm database.  
  **Progress:** Kim Lorimier has been very active in providing both formal and informal training on using the Realm, and has recently produced three "how to" videos that will be available on the website. Tony Cicala has done a lot of work on the membership including organizing meetings to formalize the use of the Realm in tracking people from visitor through member status.

Work arising during the year.

- **WiFi access at First Parish:** With encouragement from Kim Lorimier, Susanna Whitman arranged for a major upgrade in First Parish's WiFi capabilities.

- **Email issues:** There have been persistent problems with emails going through our host over the past year. As noted above, going to a new host has rectified most of these problems, although there may be lingering issues with email forwarders. Kim Lorimier has led these efforts.

Looking ahead — preliminary goals and issues for next year

- **Goal:** Respond to any communications issues arising out of the current strategic planning process.

- **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, and integrate the new minister's vision for parish communications. Possible using a consultant.

- **Goal:** Produce a high-quality "Welcome to First Parish" video for the website and featuring our new minister.

- **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

- **Goal:** Continue to improve uuneedham.org

- **Goal:** Continue to focus on social media by:
  - Continuing to improve our Facebook presence
  - Developing a more robust blog, with multiple contributors

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

- **Goal:** Continue to work with other committees to optimize First Parish's use of the Realm database.

- **Goal:** Develop an online repository for our photo library.
CONTINUING EDUCATION COMMITTEE

Committee Chair: Phil Lynes

Committee Members: Ed Lane, Eleanor Rosellini, George Rappolt, Phyllis Beck, Helen Lane, Ross Donald, Mark LaPointe (ex officio)

Mission Statement: The mission of the Continuing Education Committee is to provide adult-focused opportunities to members of our congregation and interested members of the greater community to:

- Explore and grow spiritually and intellectually
- Reflect and develop spiritual practices
- Participate in self help groups
- Learn about Unitarian Universalism
- Learn about and discuss topics related to our mission in the local community, our nation and the world.

Summary of Goals and Accomplishments:

1) Support educational projects that fit within our mission and are brought forth and proposed by members of the congregation or staff.
   - Helen Lane and Kay Taylor wanted to continue to offer the “Positively Aging” class on Tuesday afternoons once a month and we were happy to sponsor that popular group.
   - Ross Donald wanted to establish a drum circle and we supported that endeavor. It has met several times and joined with the First Parish Singers for one piece in a Sunday Service. It has three regular members and two or three others who join in occasionally. They have compiled a bibliography and other resources (instruments) in their expanding interest in sound, rhythm and spirit.
   - Rev Catie and Mark LaPointe presented a three-part series on Hebrew Scriptures taken from the Tapestry of Faith curriculum on the UUA website.

2) Develop appropriate educational opportunities by discovering ideas for interesting topics and if necessary recruiting presenters and participants.
   - George Rappolt took the lead in recruiting a number of Lyceum speakers including:
     i. Taylor Gaar from Move to Amend spoke to us about the movement to amend the US Constitution in the wake of recent Supreme Court rulings defining money as speech and corporations as persons.
     ii. Abdul Cader Asmal a local Muslim leader spoke to us about Islam and answered many of our questions about its history and practice.
     iii. Dr. Fatemeh Haghighatjoo, a former member of the Iranian parliament, also spoke at a Lyceum about the role of women in Islam.
     iv. Roberta Salper presented a Lyceum titled “Domestic Subversive”.


v. George also assisted his son-in-law Jeffrey Rivard in presenting a Lyceum on mental health awareness entitled “Becoming a Caring Congregation.”

- Helen Lane organized a three-part musical lecture/recital series with Larry Berman in the fall which was well attended and appreciated.
- Eleanor Rosellini worked on several Lyceum events including:
  i. She brought in a speaker from Mass Climate Network to talk about the Carbon Tax.
  ii. She worked with Phil on a showing of National Geographic's “Incredible Journey of the Monarch Butterfly.”
  iii. She worked with Phyllis Beck and Phil Lynes on the Book of the Year discussion group about Barbara Kingsolver's novel “Flight Behavior.”
- Ed Lane prepared and presented a Lyceum titled “A Unitarian Voice from our Past” about the writings of William Ritchie, our fourth minister from the early nineteenth century.
- Ed also recruited Amy Rands to organize and run a Sunday evening Poetry Night featuring Jane Hart and other poets and readers from our congregation.
- Phil Lynes organized four Lyceums this year:
  i. Laura Wagner, the executive director of UU Mass Action, presented an update on the current work of the political arm of the UUA.
  ii. Clark Taylor presented a talk about his experience over twenty years with a small village school in northern Guatemala which he and his wife Kay set up a partnership with for the Needham Congregational Church. He has written a book on the subject which he made available at social hour for purchase.
  iii. Rabbi Jay Perlman of Needham Temple Beth Shalom spoke to us before Passover about the significance of that holiday to Jews through history and in modern times.
  iv. In June Rebecca Hinds will be presenting a Lyceum about the work of the UU Urban Ministry in Roxbury.

3) Planning the schedule of educational events including both one-time seminars and repeating classes which may meet for several sessions over a period of time.

- Positively Aging ran under their own leadership (Kay Taylor and Helen Lane) this year and needed nothing more than our sponsorship. This continues to be a popular series.
- Helen Lane and Kathy Livingstone led a six-part series based on the book “Let your Life Speak”.
- Ed Lane led a six-part film and discussion series (with technical assistance from Phil Lynes) using the PBS series “The African American Experience: Many Rivers to Cross” produced and directed by Henry Louis Gates.
• Ross Donald followed up on the showing of “The African American Experience: Many Rivers to Cross” by organizing a group in April to visit “Unmasking Minstrelsy...” the excellent exhibit on black face minstrel shows, at the Music Library at Harvard.

• We cosponsored a two-part workshop with the Pastoral Care Committee entitled “Becoming a Seasoned Soul: How to Build Spiritual Resilience” presented by Eliza Blanchard.

• We held a multi-generational Potluck & Movie night which included the showing of Robert Reich's “Inequality for All” for the adults and Disney's animated feature “Robin Hood” for the children.

4) Working closely with the office manager and the web editor to make scheduling announcements widely publicized in the Bellman, order of service, and Bell Notes.

• We were generally able to get these announcements submitted in time for the Bell Notes and order of service although we were not always far enough ahead to make the deadlines for the monthly Bellman publication.

5) Working closely with the ministers and interns to both utilize their expertise and skills in developing and presenting interesting topics and in coordinating educational events with the church calendar and their own availability.

• As mentioned above Rev Catie and Mark LaPointe presented a three-part series on Hebrew Scriptures taken from the Tapestry of Faith curriculum on the UUA website.

• Rev Catie and Mark have been helpful in getting Rev Laurel Hallman to present a seminar of “Living by Heart” at the end of May.

6) Coordinating and sharing responsibilities with the Green Congregation Committee, the Social Action Committee or any other standing committee of the parish whenever there is cross-over in topical material.

• The aforementioned showing of the film “Incredible Journey of the Monarch Butterfly” was cosponsored with the Green Congregation Committee.

• The aforementioned workshop with Eliza Blanchard was cosponsored with the Pastoral Care Committee.

• In cooperation with the Social Action Committee a Lyceum in June will be presented on the current activities of the Needham Food Pantry. This will kick off a summer food drive with which we hope to collect non-perishable staples to support the food pantry.

• In cooperation with the Religious Exploration Committee we planned and executed a family Seder for the Passover holiday. This was a great success with Tabby Rappolt and Darren Zinner taking the lead in organizing it and with the participation of about 40 people including a dozen children or so.

7) Reporting activities to the Parish Council and maintaining a regular liaison with that body.

• Phil Lynes has been attending and participating in the Parish Council meetings and reporting the activities of the Continuing Education Committee.
Looking ahead — preliminary goals and issues for next year

1) Support educational projects that fit within our mission and are brought forth and proposed by members of the congregation or staff.

2) Develop appropriate educational opportunities by discovering ideas for interesting topics and if necessary recruiting presenters and participants.

3) Planning the schedule of educational events including both one-time seminars and repeating classes which may meet for several sessions over a period of time.

4) Working closely with the office manager and the web editor to make scheduling announcements widely publicized in the Bellman, order of service, and Bell Notes.

5) When events are to be open to the broader community beyond our own membership, preparing and disseminating appropriate news releases in a timely fashion to the web editor for release to the Needham Press, Hometown Weekly, and The Patch.

6) Working closely with the ministers and interns to both utilize their expertise and skills in developing and presenting interesting topics and in coordinating educational events with the church calendar and their own availability.

7) Coordinating and sharing responsibilities with the Green Congregation Committee, the Social Action Committee or any other standing committee of the parish whenever there is cross-over in topical material.

8) Reporting activities to the Parish Council and maintaining a regular liaison with that body.

• Issues:

This year we have not done very well with long range planning. Some of our events have been in the making for over a year but mostly not. We will try to participate more fully in the thematic planning this spring so that more of our events next year will benefit from advance planning.

As our committee membership changes with time we need to recruit more participation from younger members of the congregation.

FUN AND FROLIC COMMITTEE

Committee Chair: Liz Rover Bailey

Committee Members: Carol Alper, Anna Berkenblit, Amy Cicala, Tony Cicala, Helen Lane, Tabby Rappolt

Mission Statement: The mission of the Fun and Frolic Committee is to create low- or no-cost opportunities for members and friends of First Parish to socialize with one another across demographics, thereby building and strengthening a sense of church community.
Summary of Goals and Accomplishments:

- **Goal #1 - Host monthly free “Games Nights” with childcare provided.** The Fun & Frolic Committee hosted Games Nights in September, October, and November. These events were enjoyed by those who attended, but were sparsely attended (with Committee members comprising the majority of the participants). We therefore discontinued the Games Nights, as they did not fill a need in the congregation or further the Committee’s mission.

- **Goal #2 – Host monthly “Tastings,” with childcare provided as appropriate:** The Committee hosted a pizza tasting, a cookie tasting/exchange, a soup and bread tasting, a beer and pie tasting, and a cheese tasting (with more still to come). Attendance at, and enthusiasm for, these events varied greatly. One thing we’ve learned is that having advance sign-ups and charging a nominal fee (about $10 per person) results in a more successful event. The earlier events were pot-luck style, with each attendee bringing something for the tasting, while the later events were provisioned by the hosts of the event. Congregants seem to prefer the later model, where they can bring some small addition to the event, but do not feel primarily responsible for providing the main item.

- **Goal #3 – Organize a series of “Friendly Feasts”**: The Friendly Feasts program, in which any household can participate, has been a great success. Each household that signs up hosts one non-pot-luck dinner, and attends two others. The program is organized so that no two households dine together more than once. So far, two of the three rounds of dinners have been completed, and feedback has been unanimously positive.

- **Goal #4 – Host a FPN Camping Overnight at the end of the 2015 Summer.** Not yet completed, but sign-up and campsite-reservation information has gone out to the congregation.

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

- **Goal 1:** Coordinate the hosting of periodic “tastings” with childcare provided as appropriate. Very few of the tastings this year were hosted by the Committee as a whole. Instead, each individual member of the committee arranged and hosted one or more of the tastings. We would like to continue this model, but open it up to other members of the congregation to arrange and host a tasting (without having to be on the committee) if they are interested. The Fun and Frolic committee would still reserve a date, work to publicize the event, and procure childcare if needed.

- **Goal 2:** Continue the “Friendly Feasts” program.

- **Issues:**
  - The Fun and Frolic Committee is a budget-neutral committee. Any funds received for the “tastings” go toward reimbursing the costs the host of the event incurs (e.g., to provide beverages or the primary “tasting” food), and toward paying for childcare. This limits the sorts of events we can provide, but does not seem to undermine our mission.
  - The Fun and Frolic Committee is a new committee, (re)founded for the 2014-2015 Church Year, in response to a perceived hunger within the congregation for low-cost opportunities to socialize across demographics. This perception arose from the responses on the congregation-wide survey carried out by the Ministerial Search Committee. Interestingly, though, other committees, events, and organizations already exist within the church that also fill this need, including the neighborhood groups, book group, poetry night, the talent show, and similar
one-time events. Consequently, the Fun and Frolic committee’s mission is being fulfilled by a range of groups and individuals throughout the church and it may no longer be necessary to have the formal structure of a Committee to accomplish these goals.

FRIENDS OF SOCIAL HOUR (FOSH)

Committee Co-Chairs: Eleanor Rosellini and Katherine Lemon

Committee Members: Buffy Duhig, Muriel Gehman, Mair Lustig

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:

Social Hour continues to be a vibrant, well-attended event and volunteer hosts have done a wonderful job this past year. Thank you to all who have helped out.

- **Goal #1 set at beginning of year**: Get more commitments from committees and other church groups and reduce the number of Sundays filled with open sign-ups; minimize pleas for help.
  
  - We recruited hosts for 41 Sundays (6 hosts each Sunday -- 240 slots to fill). Eleven committees hosted, often twice. All five Small Groups hosted once, each Neighborhood Group hosted (usually once). The adult choir, youth choir, and Homegrown Coffeehouse also hosted.
  
  - Updated instructions, some parish-supplied food, and email reminders have continued to make the hosting process go smoothly.

- **Goal #2 set at beginning of year**: Reduce the number of Sundays that need to be filled by recruiting individuals to sign-up; minimize pleas for help.
  
  - Nine Sundays were filled by asking individuals (rather than committees or groups) to sign up. This was down from 19 open sign-up Sundays last year. We had only two to three Sundays when we recruited open sign-ups.

- **Goal #3 set at beginning of year**: Try to involve more members in hosting, rather than having the same people hosting multiple times. Increase of awareness within the congregation of the need for each member, who is physically able, to host twice each church year.
  
  - 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). We had a successful open sign-up in the fall after Eleanor did the Welcome and talked about hosting.

- **Goal #4 set at beginning of year**: Designate a “Kitchen Crew” Coordinator to make sure supplies are ordered and someone is assigned each month to keep kitchen tidy and clean.
  
  - Muriel Gehman stepped forward to be “Kitchen Crew” coordinator.

- **Goal #4 set at beginning of year**: Recruit new members for FOSH and “Kitchen Crew”
  
  - Gail Lehman joined the “Kitchen Crew”. No one was found to join FOSH.
Looking ahead — preliminary goals and issues for next year

- **Goal:** Ask the larger committees, Small Groups, and Neighborhood groups to host twice -- once in the fall/winter and once in the winter/spring in order to reduce even more the Sundays recruited with individual sign-ups. If the sexton is able to help with clean-up, recruiting should be easier.

- **Goal:** At least for some Sundays, try assigning dates to the various groups (then adjusting as needed) rather than filling Sunday slots one committee or group at a time, which is very time consuming. One continuing goal is to broaden the number of groups that host on the same Sunday each year, e.g., the RE committee has hosted for ingathering and the January teacher cross-over Sunday for the past two years.

- **Goal:** Recruit two new members for FOSH.

- **Goal:** See if some duties, such as sending weekly email reminders to Social Hour hosts, can be done by staff rather than FOSH volunteers. This was the original intent.

- **Goal:** Have a set of pantry guidelines sent to church committees/groups who reserve Parish Hall and intend to use the pantry.

- **Issues:** A major issue continues to be finding ways to make filling 6 hosting slots for 41 Sundays less onerous and less time-consuming. (It is a task that guarantees burn-out.) The most practical way is to ask the various groups within the church to commit to hosting twice a year.

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**GREEN CONGREGATION**

**Committee Chair:** Katrina Kipp and Eleanor Rosellini

**Committee Members:** Susan Abbott, Elinor Brady, Elise Coughlin, Linda Davis, Ross Donald, Denise Ethier, Jeff Friedman, Tom Gehman, Jeanne Gerber, Katrina Kipp, Fred Kresse, Susan McGarvey, Ed Quinlan, Jeffrey Rivard, Eleanor Rosellini, Mary Sprogell, Tad Staley

**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:**

- Order of service text (on back page) mentions "engagement with environmental and social justice initiatives" and those giving the Sunday Welcome regularly mention our environmental commitment as a certified Green Sanctuary.

- Environmental themes are included at least once a month in prayers, readings, story for all ages, or mentioned in the sermon. Also, each week during the candle lighting time, Reverend Catie includes thoughts for those suffering environmental degradation.
• Reverend Catie has given several strong sermons with environmental themes: "But Finally, Jellyfish Appeared," "Combatting Consumerism," and "Hopeful Heart." She and Mark LaPointe have mentioned Commit2Respond and the concept of environmental justice several times during services.

• During Spirit of Earth Month, in April, a testimonial on green energy was given by Green Congregation members at 4 services.

• April 19 was the date of a moving and inspirational Earth Day Service on the theme of a Hopeful Heart.

Education:
• October 5: Needham Lyceum by Gary Rucinski, Citizens Climate Lobby Northeast Regional Coordinator, spoke about the advantages of a carbon tax.

• November 2: A forum was held on the ballot question, two of which involved environmental issues.

• March 29: The film The Incredible Journey of the Butterfly was shown at noon in the Parlor, with approximately 30 people attending. (Planned together with the Continuing Education Committee)

• April 12: Eleanor Rosellini led a discussion of the congregational book, Flight Behavior, by Barbara Kingsolver; about 17 people attended. Climate change & monarch butterflies are major themes in the book.

• March 22 - April 19: The Green Congregation Committee worked with RE on Spirit of Earth Month, with 2 teaching Sundays devoted learning and activities about pollinators. GCC planned and taught the 2 sessions with support from RE parents.

• March 29: Babette Wils, a local beekeeper, spoke to RE children as part of Spirit of Earth Month.

• During Spirit of Earth Month, GCC created detailed information sheets about the options for green electricity and made the information available at a Social Hour table for 4 Sundays.

Sustainability:
• From March 2014 - March, 2015, our solar panels produced about 15,000 kilowatt hours of electricity. Since the panels were installed in March of 2013, they have produced 31,621 kWh, avoiding 42,400 pounds of CO2 and saving the church several thousand dollars on its electric bills.

• Eight First Parish members participated in the Solarize Needham program, which was publicized at church, and had roof-top solar panels installed.

• Bellman and Bell Notes were used to promote environmental presentations sponsored by Green Needham Collaborative, the Needham League of Women Voters, and a fundraiser by the Needham Community Farm.

• GCC supported Worship Committee's roll-and-stroll-to-church event on May 17. This year Worship 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 is working on a project to get recycling bins at Needham parks and sports fields.

• A major Green Energy initiative was launched in the spring, with a goal of 40 First Parish households having green energy through solar panels, community solar, or a Mass Energy Green Power program. First Parish will receive $25 for every member who signs up for Mass Energy Green Power and another $25 for each member who stays in the program at least one year. To date, 28 members have green electricity, including 9 new sign-ups for Mass Energy Green Power.

• Through efforts by the property committee, First Parish signed a contract with Lime Energy for a lighting retrofit to LED lighting. Almost half the cost is paid for by Eversource. Our $9,000 share will generate a 25% return on investment from the electric bill savings and should reduce our carbon footprint to 29% of the church's 2006 level.
Environmental Justice:
- 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. The April 19 (Earth Day) plate collection of $579.85 sponsored a raised bed at the Farm to be used for the Food Pantry.
- The Green Congregation Committee organized a work day at the Needham Community Farm on May 3, helping to rebuild their raised beds.
- Eleanor Rosellini, along with Scott Muldoon from the Social Action Committee, met with staff of the Needham Housing Authority to see how we can help with weatherization to reduce tenants' utility bills and reduce carbon emissions. A follow-up meeting needs to be set up.
- A major initiative is in the works, to encourage First Parish to participate in the UU Commit2Respond program. Endorsing Commit2Respond would mean that the congregation commits to take action over the next 2 years to reduce our carbon footprint, partner with a community affected by climate change, and support climate activism. The committee plans on a congregational vote in fall of 2015.

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.
- 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.
- Another Recycling sign (for plastic cups) has been added at Social Hour.
- 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).

Goal #4: Encourage all church committees to integrate concern for the environment in their regular committee activities. We continue to work with the Worship Committee (Roll and Stroll), the Continuing Education Committee, 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 17, March 29 film showing of the NOVA Butterfly film, and a May 3 Needham Community Farm work day. Plans for a harvest potluck were cancelled due to several other pot lucks having been scheduled by the neighborhood groups.

Other accomplishments:
- The annual plant sale from the Neighborhood Farm will be held on May 10.
- Began using the capabilities of the Realm for communications and resources.

Looking ahead — preliminary goals and issues for next year
- Goals will be similar to last year's, with the additional goal of getting a congregational vote on Commit2Respond.

Issues:
- For our events we would like more participation by young families, and we could always use more members who can commit time and energy.
- Please note that the Green Congregation Committee often works with, and through, other committees or groups. For example, the Worship Committee organizes Roll and Stroll Sundays, with support
from Green Congregation. The Property Committee arranged for the lighting retrofit after Green Congregation brought their attention to the State rebate program. The Continuing Education Committee organizes some of the environmental presentations. Social Action will be 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.

THE HOMEGROWN COFFEEHOUSE

Committee Chairs: Jim & Beth Sargent

Committee Members: No standing members. This 32 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. Karl Heinz has been with the Homegrown for more than 25 years. Tom & Muriel Gehman, Jim Long, Judy Matterazzo, 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 celebrated our 30th birthday this Fall, marking three decades 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. **Done.**

- **Goal #3**: Raise at least $7,500 for the FP general fund. This was a significant bump up in our fundraising target. **Done**

- **Goal #4**: Involve new people in the fundraising life of FP. **Done**

Looking ahead — preliminary goals and issues for next year

- **Goal**: Continue fundraising at at least the $7,500 level, recognizing that snow, performer illness, and local competition can have an unpredictable, negative impact. We lost one show this season due to the awful February weather conditions.

- **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.

- Look to involve more of the performers in Sunday morning services, as their schedules allow.
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 set at beginning of year: Pot luck supper to be held on June 3, 2015.

Accomplishments:

- Annual Vegetarian Pot Luck Dinner was held on June 4, 2014. Over 20 people watched the DVD Immune Solution with Dr. Joel Fuhrman, followed by a discussion of information presented in the film.

- Continue to loan books as people request them.

Looking Ahead: Continue our goal of helping to educate people about the relationship between food and health. The next Pot Luck Vegetarian Dinner will be held Wednesday, June 3, 2015. The film Fed Up will be shown.

Continue to offer the use of lending library books and DVDs on healthy living.

MEMBERSHIP COMMITTEE

Committee Chair: Kay Taylor


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 education, outreach, and social programs of First Parish.

4. Where appropriate, facilitating and supporting the journey of newcomers from first time visitors to active members.

Summary of Goals and Accomplishments:

Our first priority remains to grow our current membership. Over the past 3 years, membership has remained stable but has not increased. (Certified members reported to UUA for membership records each January: 264 in 2011, 271 in 2012, 274 in 2013) We welcomed four new members on April 28, 2013 and 12 new members on March 30, 2014.

During the past year, we have welcomed 29 new members. Fifteen joined in December and 14 more in March. The majority of these new members 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, and some members of Membership Committee are serving as neighborhood captains.

We have worked hard to “formalize” the path to membership and involvement in First Parish. So many of those interested in First Parish are from other faith traditions or no faith traditions and our approach can seem a bit “squishy”. We have settled on a series of visitor orientation sessions twice each year, followed by a time of signing the membership book in the minister’s office.

† Leslie Caulfield has organized teams of greeters for each Sunday. We are also providing greeters for summer services.

We continue to work with RE to identify newcomers (often the first contact with First Parish is registering children for RE) and to coordinate and simplify record keeping to track progression to membership.

**Looking ahead**

We will continue to reach out to potential members, to greet visitors and to help new people get connected and feel welcome in the First Parish community.

We will explore ways to reach out to underserved populations in Needham.

We will explore ways to keep members connected and served by First Parish as their children age out of religious exploration programs.

**Issues:**

We are concerned about First Parish’s outreach to the community, both in terms of letting the community know about First Parish and about inviting diverse people to become part of the community.

We are beginning to think about the needs of families whose children have aged out of the religious exploration program. During the coming year, we hope to work with the new minister to design some strategies for identifying the needs of that age group and designing some strategies to meet those needs.

We are working with the DRE to design a program for providing help for people in various kinds of transitions, starting with the transition from work to retirement. That program will likely start in the fall, 2015.

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**MEMORIAL FUND AND GARDEN COMMITTEE**

**Committee Chair:** Elizabeth Duhig & Kay Taylor

**Committee Members:** Dick Eastman, Tom Gehman, Lyn Jekowski, Gail Lehman, Mair Lustig, Mary Lou Manzon

**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 fifth 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.
- Installation of an easier watering system at Lincoln St, gardens and Memorial Garden continues to be improved upon.
- Added gardens to the front of the church at the top of the ramp and put trees along the white wall of the Farmhouse Restaurant.

Looking ahead – preliminary goals and issues for next year:

* To continue to maintain and improve the gardens year round for the pleasure of everyone.

MUSIC COMMITTEE

Committee Chair: Becky Siebens and Emily Weiland

Committee Members: Carol Alper, Betty Byers, Andrea Goldberg, Ross Donald, Cynde Hartman, John Smith, Jim Sargent. First Parish Music Staff: Music Director Irina Georgieva and Music Director for Youth and Intergenerational Programs Kate Loftus-Campe.

Mission Statement: The Music Committee supports music at 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:

This year is the first following a transition period during which the congregation—in addition to finding a new minister—also sought to open a broader conversation about music, and to find a new music director to develop a diverse and vibrant music program. We are pleased with excellent progress made during this foundation year. Following are goals from last year’s Annual Report with updates on progress, as well as goals for the future.

- Continue to foster community and the love of music in First Parish. With the new Music Director, support music as an evolving avenue for fellowship, joy and growth. Encourage the new Music Director to build relationships with the musicians and non-musicians in the congregation, to consider ideas heard from members and from our visits to other churches, and to take leadership him/herself in exploring possibilities to open up music for the congregation in new ways.

We were thrilled to welcome a new Music Director this year: Irina Georgieva joined the staff in August. She has a Doctorate of Musical Arts in Choral Conducting from Eastman School of Music (2013) and is Assistant Professor of Conducting at the Berklee College of Music. The Music Director Search Committee included two Music Committee members and 3 other congregational representatives, working with a new job description based on feedback from the congregation. Irina was the top candidate among 20 applicants, a strong field made possible by the church adding hours and benefits to the position.

In her first year Irina has been developing a collaborative relationship with Catie and the staff team, while building relationships with members of our church and the larger music community in the area. While Irina’s background is primarily in classical music, she is creating a collaborative and diverse program of
service music, with regular participation by the adult and children’s choirs, First Parish Singers, and smaller ensembles. Catie and Irina’s musical choices reflect the theme of each service, with genres ranging from classical to jazz to pop to folk. In addition to the diversity of performances by others and in her own piano work, Irina has experimented with having the choir in new configurations and has introduced the congregation to a number of new hymns. She has also reached beyond our own congregation for music relationships, arranging for members of the choir to sing in a joint presentation Mozart’s Requiem with the Newton and Dedham UU choirs.

Kate Loftus-Campe, Assistant Music Director for Youth and Intergenerational Programs, introduced the church’s first hand-chime choir, the UU Ringers, composed of middle school students. This ensemble reaches a new age group for music at First Parish. We hope to add to our starter collection of chimes in the next few years. Kate also continued weekly practices with the Children’s Choir, providing both music education and performance opportunities for children at First Parish.

Currently, the choir has 18 core members, the Children’s Choir has 16 members and the UU ringers has 7 members.

- **Offer occasional music gatherings and programs outside of worship, including partnering with other church entities such as RE, Continuing Education, Pastoral Care, Positively Aging, and Worship.**

Outside of worship, the Music Committee hosted several programs, including a professionally facilitated harmony workshop for people of all musical abilities (led by workshop leader Jan Maier) and a well-attended Holiday Sing-along in December with refreshments, crafts, and lots of cheerful caroling. We collaborated with Continuing Education to support a series of lecture-performances by concert pianist Larry Berman. The 2015 Talent Show, “First Parish Shines,” was staged with support from the RE Committee, Tom Gehman (sound/stage manager) and other volunteers. This fundraiser featured 16 acts performed by all ages, including music ranging from show-tunes, acoustic folk songs, a one-night chime choir, plus a cooking demo and two skits, one featuring Rev. Catie and whole staff.

**Other accomplishments**

- **Instrument care:** (1) Organ – an organ specialist examined and noted the high quality of our instrument for its type. He made minor repairs, but could not fix ongoing ones, noting that further repair involves time and expense given the way such organs are constructed. (2) Grand Pianos - added signage to ensure that the instruments are kept away from extremes of heat and humidity.
- **Track record of music at FPN:** Irina is keeping a written record of weekly musical selections, which will allow data-informed discussions as part of the ongoing “music conversation” and create a valuable record for future musicians at FPN and in the UU community.

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

The Music Committee is holding its first retreat in May/June 2015 to discuss:

- Goals based on our responsibilities as a committee: supporting the music staff, caring for our instruments, and finding additional avenues to help people experience and enjoy music.
- Intentional ways to continue the “music conversation” by eliciting feedback.
- Reviewing the first year of data from the new tracking system and what it tells us.
- Building our multi-generational music program, including developing our in-house musical groups, encouraging youth involvement and reaching out to newcomers.
- Completing necessary repairs to the organ and obtaining a piano for the music room.
Other issues for next year:
• Resolving the need for a supported tenor section in the adult choir is key.
• We hope to work more closely with the Program Council, other committees, and church staff to coordinate priorities for the 2015-16 church year.

NOMINATING COMMITTEE

Committee Chair: Jackie Boni
Committee Members: Anna Berkenblit and Phil Lynes
Mission Statement: The mission of the Committee is to develop a slate of officers for 2015 – 2016.

Summary of Goals and Accomplishments:
• In January the two outgoing members of Parish Committee joined us to begin developing a slate of officers for the 2015-16 year. We had many conversations with parish members and have a slate prepared. Members of the Nominating Committee respectfully submit the following proposed slate of candidates for election at the 2015 Annual Meeting. [See the Warrant, p. 4 of this Report for the complete slate of candidates]
• Additional nominations may be made in accordance with the Church Bylaws (Article X, Section 2): “Subject to the consent of the person nominated, nominations may be made from the floor during an election, and intent to nominate may be published in the Church bulletin at the request of any five voting members.”
• With regard to term of office, the Church Bylaws state: (Article VII, Section 2) “All Officers except Trustees shall be elected each year at the Annual Meeting for a term of one year, shall take office at the close of the Annual Meeting, and shall serve for a period no longer than three consecutive years in a given office,” (Article VI, Section 1) “The six elected members (of the Parish Committee) shall be elected for overlapping three-year terms, two to be elected at each Annual Meeting. They shall not serve consecutive terms,” (Article VII, Section 3) “There shall be three Trustees of Invested Funds, one to be elected at the Annual Meeting each year for a term of three years. A Trustee shall not serve more than two consecutive terms.”

Looking ahead — preliminary goals and issues for next year
• Goal: To work with Rev. Catie to investigate expanding the committee to include positions outside the formal slate process.

PASTORAL CARE TEAM

Committee Chair: Janet Klein
Committee Members: Rev. Catie Scudera, Buffy Duhig, Phil Griffith, Judy Hadrick, Lyn Jekowsky, Helen Lane, Jim Leffingwell, Carolyn Lynes, Becky Siebens, Tad Staley, 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 of our congregation. 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.
4. Provide mutual support and fellowship for one another in monthly meetings, while also looking toward our own spiritual growth and enrichment.

**Summary of Goals and Accomplishments:**

- **Goal #1** Partner with Rev. Catie as she gets acquainted with First Parish membership, addressing our pastoral priorities and needs together.

- **Goal #2** Continue to raise visibility and accessibility of Pastoral Care Team and its function. Rev. Catie mentions the Pastoral Care Associate available each Sunday during Candles of Joys and Concerns. Blue “Here to Help You” cards on the Welcome Table, defining our role. New Pastoral Care poster made with Rev. Catie’s photo, for display at Social Hour. Group photo taken for the website.

- **Other accomplishments**
  - Facilitating the First Parish community living our covenant as “a loving community, encouraging and comforting one another,” by recording our Sunday service’s Candles of Joy and Concern and sharing in the *Bell Notes* and *The Bellman*.
  - In-service Team Retreat in January: caring for ourselves, exploration of issues around asking for care and receiving care.
  - In-service open to community: Rev. Eliza Blanchard presented a two-part workshop: Building Spiritual Resilience.
  - Developed the procedure “Contacts for a Pastoral Care Emergency, Whom to reach, how to reach them in an emergency” and shared handouts with the Positively Aging group, published the procedure in the *Bell Notes* and in the April *Bellman*, including our contact information.
  - Wrote a blog on “Being Mortal,” the book by Atul Gawande, advocating honest discussion about care needs for the aging, and end of life care.
  - The Support Group for Caregivers continues to meet twice monthly, led by our member Lyn Jekowsky, a nurse with significant experience.
  - Established a phone tree for efficient group notification in an emergency.
  - Researched the community resources available for surrounding towns, to facilitate Rev. Catie’s referrals to those community’s residents who are in need, should they approach her for help.
  - Hosted two Social Hours.

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

- **Goal:** Explore end of life issues by: 1) Choosing the book “Being Mortal” by Atul Gawande as the book of the year. 2) Presenting a workshop with the Continuing Education Committee on “The Conversation Project” about initiating discussions with family and friends about personal choices in
end of life care. 3) Offering “The Five Wishes” course in cooperation with the Continuing Education Committee.

- **Goal**: Gather books on grief from personal libraries and make available to community. Develop a lending library for pastoral care concerns, starting with the topic of grief.

- Consider screening the movie *Still Alice*. Provide resources for those families dealing with issues of dementia.

- **Issues**: Continuing to care for ourselves at the same time as caring for others remains a focus for our team. Reviewing assignments and looking for ways of sharing duties as they arise are priorities. Welcoming and orienting new members will allow present members to step away for a time, as needed, or to step down.

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**PROGRAM COUNCIL**

**Committee Chair**: Don Leathe (as Vice President of Parish)

**Committee Members**: All committee chairs of FP are members, this means: Jeanette Anderson (Archives), Buffy Duhig (Caring Crew, Friends of Social Hour, Memorials and Special Gifts), David Mecsas (Communications), Phil Lynes (Continuing Education), Tracy Abbott (DRE Relations), Bob DeNoble (Finance), Eleanor Rosellini (Green Congregation, Social Hour, Kitchen Crew), Katrina Kipp (Green Congregation), Jim & Beth Sargent (Homegrown Coffee House), Bruce Barnett (HR), Mary Ann Oldfield (Interior Arrangements), Muriel Gehman (Kitchen Crew), Kay Taylor (Membership), Becky Siebens & Emily Weiland (Music), Katie Edwards (PYC, Stewardship), Janet Klein (Pastoral Care), Ed Quinlan (Property), Alan Robins (RE), Helen Lane (Small Group Facilitators), Scott Muldoon & Clark Taylor (Social Action), Liz Rover Bailey (Fun and Frolic), Mary Bilder (Worship), Kristen Neff (YAC).

**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**: Publicized opportunities for involvement, committees needing increased volunteers @ First Parish (used multiple communication vehicles to accomplish this)

- **Goal #2**: Coordinated committee development of mission, vision and goals statements (collected, mapped to existing website, and communicated consolidated list as needed)

- **Goal #3**: Investigated and encouraged opportunities for cross-committee program development

- **Goal #4**: Served as an important cross-committee communication vehicle

- **Goal #5**: Served as an important forum for identifying key committee issues and aiding in their resolution

- **Other major topics that were addressed this year include the following**;

- Continued Realm training
• Committee website blogging opportunities
• Social Hour set up/tear down staffing
• Sexton hiring and duty need identification
• Procedures for committees’ meetings scheduling, room reservation and calendar publication
• Worship committee summer service planning
• Membership neighborhood mapping project (status, usage)
• Cross-committee communication and program planning

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

• **Goal #1**: A key challenge for the Council continues to be how to increase the value of this group by making it more entrepreneurial so that it serves as a more vibrant forum for program and event idea generation, development and implementation.

• **Goal #2**: Continue to serve as a vital cross-committee communication forum as well as one that aids in surfacing and resolving of key committee issues.

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**RELIGIOUS EXPLORATION**

**Committee Chair**: Alan Robins

**Committee Members**: Molly Kerrigan, Laura Long, Jen Packard, Jodi Rooney, Tracy Zendzian, Mark LaPointe (ex-officio)

**Mission Statement**: The mission of the Religious Exploration Committee is to: ensure that the RE program is of the highest quality, meets the needs of First Parish families, and is consistent with UU and First Parish principles.

**Summary of Goals and Accomplishments**:

The goals of the RE Committee for this year continued to be focused on developing The Way Cool Sunday School

The overall objectives of The Way Cool Sunday School are as follows:

• Fosters student and family relationships that engender a sense of belonging and community identity,
• Is taught by passionate, well-supported volunteers who bring enthusiasm and an engaging learning style to their classrooms,
• Is built upon a curriculum that is easily transferable to participants’ everyday lives, using concrete and modern examples,
• Utilizes fun, appropriate learning styles and available technology to address a variety of student needs,
• Enables engagement with the broader community through social action.

In the third year of building Way Cool Sunday School, the focus of the committee this year was on completing and making permanent several of the projects which were initiated in the first two years.
Events – Identify, organize and execute an event or three that enable parent connection within and across classes and foster a sense of fun among children.

Social Action – Develop an informal expectation that most grades will do some social action project during the year and provide resources to make this easy for teachers.

Teaching Experience – Determine high priority areas of support to provide teachers that will support the overall Way Cool Sunday School objectives.

Curriculum Review – Develop a framework against which we can measure our entire K-8 curriculum to ensure it is consistent with the church’s mission and our RE objectives.

Progress against those objectives (as of mid-May) is as follows:

Events – RE staged or cooperated on several events which were well-attended and achieved the objective of allowing parents and children to get to know each other better. Included karaoke night; talent show and Seder.

Social Action – Implemented Social Action “Project in a Box” Kits, with support materials for an age-appropriate social action project.

Teaching Experience – Developed method to enable teachers to more easily share lesson notes and ideas from one year to another. Planned appreciation breakfasts and partnered new teachers with more experienced teachers for first year of teaching. Developing plan for a thank you event to be held as part of a service towards the end of the year.

Curriculum Review – Developed a goal statement for the RE Curriculum, as follows:

The goal for the Religious Exploration curriculum, in partnership with the congregation, is to guide our children in exploring the values embodied in our covenant and the seven UU principles. In particular, these themes 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.

Currently reviewing each grade curriculum against these goals to identify any gaps and introduce new curricula as appropriate to address those gaps.

Looking ahead — preliminary goals and issues for next year

- Continued Support for new Minister and Strategic Plan: Working alongside our new Minister and the RE Director to help plan for the future success of the RE program
- Leadership Transition: Current chair is resigning at the end of this year. New co-chairs from the existing committee members have been identified for a smooth transition.
STEWARDSHIP COMMITTEE

The members of the 2015/2016 Annual Budget Drive (“ABD”) Committee were Katie Barnett, David Mackey, Nancy Wilde and Darren Zinner, with significant support from Rev. Catie and Susanna. Our goal was $350,000, as opposed to the $315,000 raised last year. We met with last year’s co-chairs in November and December, and with their feedback designed a three phase approach:

1) Phase 1 involved setting up a table at coffee hour for the last three Sundays in January, with a notice in the Order of Service and a reference to the ABD in one of the Sunday “Welcomes”. We announced the theme: “Make It Unanimous Again!” (with reference to the unanimous vote for Rev. Catie’s appointment last year), and prepared a letter to the members about the ABD and a “Frequently Asked Questions” fact sheet. We encouraged members to come to the table at coffee hour and fill out their pledge form, and as an extra inducement offered a raffle for dinner with Rev. Catie and her husband for two members selected at random from those who pledged in January and increased their pledge by 10% or more. After Phase 1 we had received pledges from 60 families, 35 of whom increased their pledge by 10% or more, for a total of $170,000 (almost 50% of our goal). Bob and Pat DeNoble and Charlotte Gilson won the raffle for dinner.

2) Phase 2 involved e-mails in February to all members who did not participate in Phase 1, with the ABD “Frequently Asked Questions” flyer attached. For those who did not respond initially (and the snowstorms probably didn’t help), we sent follow-up and reminder e-mails. By the end of February we had received an additional 40 pledges (for a total of 100 at this point), bringing us to a total of $245,000 (approximately 70% of our goal).

3) Phase 3 involved more direct communications (including a new member dinner at the Zinners, phone calls and other outreach), lasting through the first week in April. Through Phase 3 we received an additional 51 pledges, and raised the total pledged to approximately $335,000 (almost 96% of our goal).

4) Finally, after consultation with the Parish Committee, we made one final ask at the service on April 12, specifically for a “supplemental pledge” dedicated to support music at First Parish, especially for guest musicians and musical performances at holidays. We received a total of $3500 in supplemental pledges for this effort, bringing the total raised to approximately $338,500 (almost 97% of our goal).

Some highlights: 151 out of 159 member families participated (95%). The average pledge was almost exactly $2000. The total we raised was a 7.5% increase over last year. 47% of our pledge units increased their pledges from last year, 30% remained the same, 11% made smaller pledges, and 11% were new members or did not pledge last year. We lost approximately $12,000 in pledges for members who moved or passed away, but more than made up for that with increased pledges from existing members and a very healthy $15,000 in pledges from new members.

All in all the ABD Committee had a successful year. We enjoyed working together and learned a great deal which we hope to pass on for next year’s effort.
WORSHIP COMMITTEE

Committee Chair: Mary Sarah Bilder     Vice Chair: Tracy Zinner

Committee Members: Jeanette Anderson, Lisa Bond, Elinor Brady, Jim Leffingwell, Phil Lynes, Scott McCue, Barbara Ridge, Liz Rover-Bailey.

Associated members: Priscilla Mullin (ushers), Kay Taylor (congregational flowers)
Summer Service Coordinators (2015): Phil Lynes and Tad Staley

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 provides assistance to the Minister in setting up the chancel and church for service and cleaning up afterwards. 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:

• Transition to and support for Rev. Catie Scudera. The Committee worked closely with Rev. Catie Scudera in her first year of ministry. The Committee continued its practice at its monthly meetings of reviewing past services for strengths and continued growth opportunities. The Committee read Worship that Works. We revisited many aspects of the worship experience: the Welcome, candles, pastoral prayer, meditation, extinguishing of the chalice, and others. Rev. Scudera and the Committee continued to support multigenerational worship and the Time for All Ages. The Committee supported experimentation with the song to sing the children out. The Committee remained conscious of ensuring Green Sanctuary commitments. The Committee and Rev. Scudera continued to work on timing and flow of elements based on feedback from parishioners. The Committee believes that Rev. Scudera’s inaugural year went exceptionally well.

• Coordinate Worship in the Absence of the Minister: The Committee has continued to create and improve our ability to coordinate worship on the days that the minister is not in the pulpit. The 2014-2015 year was our second year without an intern minister. There were 9 Sundays that the minister was not in the pulpit. These were covered successfully: 9/28 (lay led members who attended General Assembly); 10/12 (Rev. Sean Barron); 11/9 (UU Mass Action; Laura Wagner; Lisa Bond WA); 12/28 [Nick MacDonald]; 1/25 (K. Harper); 2/15 (Stephen Shick); 3/15 (Mark LaPointe); 4/26 [Ilene Gillispie); 5/24 (Joan Javier-Duval). Committee members served as Worship Associates (Liz Rover-Bailey, Lisa Bond, Traci Zinner, Scott McCue, Jeanette Anderson). The Committee also extended the pool of worship associates (John Smith, Dick Eastman; Janet Klein). We developed and improved our instructions and checklists for Worship Associates. Our newest member Jim Leffingwell will be taking a particular interest in helping us strengthen the Worship Associate component. Although snow prevented Stephen Shick from preaching, we hope to arrange a date for him to be our guest in the 2015-2016 year.

• Support Diversity in the Pulpit: The Committee continued to issue invitations conscious of the importance of supporting diversity in the pulpit. The Rev. Kristin Harper was our guest minister for our third consecutive year—to rave reviews once again. Joan Javier-Duval will be joining us in May.
Mark LaPointe generously took the pulpit in March. The Committee also supported the Racial Justice Task Force’s use of the Wayside Pulpit with “Black Lives Matter.” Rev. Scudera crafted a new “Welcome” to be read after Committee discussions. Rev. Scudera incorporated a pastoral prayer after candles referencing important larger social matters of concern.

**Support Year-round Worship and Organize Parish Hall (Summer) Services:** The Worship Committee continued to work on supporting year-round worship. A year-round schedule has brought First Parish in line with other area congregations, offers an important support network for parishioners over the summer, and provides an opportunity for visitors and interested newcomers to attend in a smaller setting. The Worship Committee organized 11 summer services in 2014 from 6/20/2014-8/31/2014. Five of these services were outside ministers or ministerial students: Eliza Blanchard, Jane Detwiler, Megan Lynes, Aaron Stockwell, Sean Neil-Baron. The remaining six services involved lay members who generously shared their time and insights: Rev. Katie Lee; the Ministerial Search committee, the First Parish Singers, Small Group Ministry, Darren Zinner & Ed Lane, and Cathy Livingston. The committee prepared extensive materials to support the summer volunteer-run worship services. Tracy Zinner and Jeanette Anderson served as the Summer Service Coordinators for the summer of 2014. The services were well-attended and successful. The budget was rearranged last year to place the summer services support funds within the larger worship budget. The summer music expenses and childcare expenses were relocated to music and RE. Additional lay members were recruited from within the congregation to assist as worship associates in the summer and during the year. For the summer of 2015, the Committee identified and recruited new Summer Service Coordinators. Phil Lynes and Tad Staley generously agreed to serve. As of April, the Committee had almost completely set the schedule.

**Identify new Committee members.** The Committee has continued to grow its membership with a goal of ensuring that many perspectives are reflected. Liz Rover Bailey joined, providing continuity with the Ministerial Search Committee, and Phil Lynes joined to provide continuity with the Lyceum and Summer Services. Jim Leffingwell recently joined the committee to add strength to the Committee’s worship support activities. Barbara Ridge, Lisa Bond, and Mary Bilder will step down from the Committee this year.

**Continue work on systems that allow for effective operation of all aspects of the worship service:**
- The Worship Committee held the fifth annual planning retreat in February 2015. In addition to the Committee, the DLRE Director, RE Committee, and Children’s Choir Director were present. An annual worship and RE calendar was drafted that integrates participants, key activities, holidays, and dates for First Parish. This retreat continues to be a successful system.
- The Worship Committee out of necessity has been coordinating ushers through Priscilla Mullins has been very successful. The Committee is very grateful to Priscilla’s long service. She will be stepping down from as Usher Coordinator. The Committee will be engaged in discussions about how ushering should be taken care of moving forward.
- With respect to flowers, once again volunteers were signed up for the entire year in May 2013. The chair then emailed a reminder each month to volunteers. This system was extremely successful. Kay Taylor continued to perform an extraordinary service in arranging flowers for the Sundays on which the congregation provides flowers. Susanna Whitman was indispensable in coordinating the dedications in the order of service. Elinor Brady has generously agreed to take over the emailing function.
• Welcomes, Chalice Lightings, and Readings. The Committee continued to try and create systems for identifying members to participate in the service. Mark LaPointe helped with the chalice. Scott McCue took over the Welcomes.
• Lighting and sound in the Sanctuary. The Committee supported efforts to replace the lighting in the Sanctuary. We remain concerned about the difficulties faced by low-vision members when the lights are off and look forward to new lights which will help meet Green Congregation concerns. The Committee discussed and supported a plan to replace the Sanctuary speakers to improve sound in the front pews.
• Roll and Stroll. The Committee under the leadership of Elinor Brady and with the assistance of Lisa Bond coordinated and planned the Roll and Stroll.
• Summer Services 2015. With eleven services in the 2015 summer calendar, the Committee once again moved quickly to plan the summer services for 2015. By April 2015, the summer services schedule had been set and ministers or lay leaders obtained for every date.
• Wayside Pulpit. The Committee took over the task of managing the Wayside Pulpit.

Looking ahead — preliminary goals and issues for next year

• Continue to work and support Rev. Scudera in worship.
• Continue to develop more lay-led services during the September-June worship year and grow the Worship Associate component.
• Work with a sexton (or develop solution) for Wayside Pulpit, set up at Parish Hall services.
• Transition to a new chair (Scott McCue).

Respectfully submitted, Mary Sarah Bilder (chair)

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**YOUTH ADULT COMMITTEE (YAC)**

Committee Chair: Kristin M. Neff

Committee Members: Cassie Bailey, Molly Kerrigan, Mark La Pointe, Gwen Mecsas, Priscilla Mullin, Emma Needham, Arturo Perez, Libby Schap

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 where they can build strong bonds of friendship, experiment with their own identity, 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 to 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 to feel connected to the world through direct service and reflection, and to help them to 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 continue to support the Youth Group Advisor and the Lay Advisor in their roles with the Youth Group.

   **Accomplishments:** YAC meets on a regular basis, typically every 1-2 months, to discuss planning, activities, fundraising, the service trip and other miscellaneous topics. Participation is good and ideas are shared freely by all. YAC is also able to help with last minute needs such as volunteer leadership from unplanned absences of Youth Group Advisor or Lay Advisor. In addition, the YAC Chair met with the Youth Group parents to introduce YAC, discuss goals and expectations, and generally strengthen the connection between YAC and parent, and facilitate parents meeting each other.

2. **Goal:** To continue to strengthen the Youth Group as a place our youth want to spend their time, and to find ways to connect with the youth who are currently not active in the Youth Group.

   **Accomplishments:** The Youth Group strives to welcome and include anyone who wants to participate.

3. **Goal:** To work with the Youth Group to identify ways to incorporate spiritual activities that are meaningful to them in the Youth Group meetings.

   **Accomplishments:** Bringing spiritual activities into the Youth Group meetings continues to evolve.

4. **Goal:** To continue to explore ways to add more value to the Youth Group for the current members – more/less structure, more/less spiritual exploration, more/less opportunities for youth to take on leadership roles, etc.

   **Accomplishments:** The Youth Group Advisor has continued to refine the Youth Group meetings to meet the needs of the Youth. This year, changes have included more unstructured time to allow the Youth to relax, get to know each other, and have fun. Also, some youth have had the opportunity to take on leadership roles, such as acting as “treasurer” or organizing fundraising events such as the Soup Sundays.

5. **Goal:** To create a link between the Youth Group/YAC and the RE Program/RE Committee as well as the Junior Youth Group that recognizes the journey our youth take through these programs, supports smooth transitions, and provides an environment that makes Youth want to continue through the programs.

   **Accomplishments:** There is close communication between the Youth Group Advisor and the Director of RE throughout the year. Also, activities have been organized which include both the Junior Youth Group and the Senior Youth Group, such as attending the “Equality for All” multigenerational event in January.
6. **Goal:** To provide opportunities for the Youth Group to interact with the greater congregation so that they can appreciate each other’s talents and contributions.

**Accomplishments:** In addition to participating in the “Equality for All” multigenerational event in January, the Senior Youth Group Soup Sunday fundraising events have been a valuable opportunity for the youth to attend Social Hour and interact with the First Parish community.

**Additional Accomplishments:**

The Youth Group has taken a more active role in fundraising, and the Youth Group Advisor and Lay Advisor are continuing to reinforce the importance of fundraising to the activities that the youth want to do throughout the year.

The Youth Group traveled to Once Upon a Time Breakaway in the Smokey Mountains in Maryville, TN for their annual service trip. The service was based in environmental activities. In addition, the Youth had some valuable learning opportunities about the region. All in all, the trip was a success, and may be considered again in future years.

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

1. **Goal:** To find ways to connect with and support the Youth Group Advisor and the Lay Advisor in their roles with the Youth Group, and to facilitate communication with the parents of the Youth.

2. **Goal:** To continue to strengthen the Youth Group as a place our youth want to spend their time, and to find ways to connect with the youth who are currently not active in the Youth Group.

3. **Goal:** To work with the Youth Group to identify ways to incorporate spiritual activities that are meaningful to them in the Youth Group meetings.

4. **Goal:** To continue to explore ways to add more value to the Youth Group for the current members – more/less structure, more/less spiritual exploration, more/less opportunities for youth to take on leadership roles, etc.

5. **Goal:** To create a link between the Youth Group/YAC and the RE Program/RE Committee as well as the Junior Youth Group that recognizes the journey our youth take through these programs, supports smooth transitions, and provides an environment that makes Youth want to continue through the programs. We want the youth to be excited about going all the way through the RE Program including the Youth Groups.

6. **Goal:** To provide opportunities for the Youth Group to interact with the greater congregation so that they can appreciate each other’s talents and contributions. As part of this goal, facilitate continued connections with recently graduated Youth Group members which will possibly help them with their transition, and help current graduating Youth Group member prepare for their transition.
FINANCE COMMITTEE

Committee Chairs: Erik Bailey (Treasurer), Bob DeNoble

The 2014-2015 church year has been a transition year in many financial aspects. A new fiscal year schedule, a new minister and music director, as well as the first annual budget in several years not to be supplemented by one-time funds, all contribute to the changes we have all witnessed. In addition, extensive work on the physical building has occurred, improving our space but representing a significant capital outlay.

The impact that each of these is described here in the sections below, followed by the FY16 budget to be approved at the Annual Meeting.

New Fiscal Year:

As described in the last two Annual Reports, First Parish has changed its Fiscal Year to a new July 1 - June 30 format. This is more consistent with the overall church year, allowing more accuracy and predictability in the numbers. However, this comes at a bit of a price accounting-wise. There is a period where there are 14 months of expenses (May 1 through the following June 30), but no corresponding increase in revenue (since we did not ask members to pledge 17% more to cover the extra two months).

The 2012-2013 Annual Report considered this two month “Stub Period” to be part of the FY14 budget. However, it made an optimistic assumption that revenue would be consistent for those two months. The highlighted number below ($52,994) from last year’s Annual Report was not revenue that could actually be fully realized. While we certainly continued to receive cash during these two months, it was not necessarily actual additional pledge revenue.

![Figure 2: Detailed breakout of the revenue budget](image)
Pledge units who pay in a lump sum, quarterly, or irregularly, are unlikely to have been contributors during this period (except by happenstance). For example, a pledge of $5,000 paid in a single payment is the same whether the fiscal year is 12 months or 14 months.

The only real exception to this is pledge units who are contributing a periodic, fixed amount month-over-month (e.g., through automatic payment or withdrawal). In those cases, the total FY15 14-month payments may actually be larger than the 12-month payments would have been. As such, it is also incorrect to assume that the pledge revenue would be zero. In actuality, it would be somewhere between zero and $52,994, but probably much closer to zero.

The actual FY14 pledge receipts and donations were approximately $298,000 (inclusive of early and late FY14 pledge receipts, which were outside of the fiscal year boundaries). This matches the FY14 pledge target, but does not match the $350,995 revenue budget number. In budget terms, looking at two consecutive fiscal years, FY14 + FY15 budgeted pledge revenue is not $350,995 + $314,000, but is actually $298,000 + $314,000, spread across a total of 26 months.

The total actual 12-month FY14 income (including rent, etc.) was approximately $432,000 (exclusive of early FY15 and late FY13 pledge receipts, which are positive inflows into the bank account, but are not part of FY14 revenue). Counting the Stub Period, total 14-month FY14 actual income rises to $446,000 (primarily due to NCC and Ballet rent).

The 12-month FY14 actual expenses were approximately $389,000. Counting the Stub Period, the 14-month FY14 actual expenses rise to $454,000. This $65,000 additional expense was exactly as budgeted;

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<th>FY '12/13 budget</th>
<th>FY 13/14 Budget May - April 12 Months</th>
<th>FY 13/14 Budget May - June 2 Months</th>
<th>Total 14 Months</th>
<th>$ Variance Bud/Bud</th>
<th>% Variance Bud/Bud</th>
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Looking at FY14 as a whole, from a 12-month perspective there was a $43,000 surplus ($432,000 income vs. $389,000 expense). But when the 14-month perspective is applied, that surplus turns into a $8,000 deficit ($446,000 income vs. $454,000 expense).

Overall, given the complexities of the fiscal year change, the budgeting was done pretty well. In hindsight, the only change that should have been made was not budgeting additional income; other than that, the numbers were pretty close to targets.

For FY16, none of this will be an issue, because it will be a fully consistent budget year.

New Minister and Music Director:
This year we welcomed Rev. Catie Scudera into ministry at First Parish! From a financial perspective, the primary change for the upcoming year is a significant budget increase compared to FY15, due to her presence for the full church year. As described in the 2014 Annual Report: “The 2014 – 2015 budget includes compensation for our new minister beginning in mid-August 2014 through June 30, 2015. Thus
the minister compensation is computed for a 10 1/2 month period. Katie Lee Crane, our current interim minister, has graciously agreed to provide pastoral care coverage as needed for the month of July as a contribution to the Congregation. While the budgeted expenses for ministry are less than last year, these expenses will increase next year when our newly settled minister will be in place for the full year.” As such, significant new budget is required for FY16 compared to FY15 to cover a full 12 month compensation period (as well as summer pastoral care during Rev. Catie’s absence).

We also welcomed Irina Georgieva as our new Music Director! There was no budget impact for this hire, though, as the current-year budget amount is sufficient for the new year.

**One-Time Funds:**

The FY15 budget (the current year) was the first in a number of years to not utilize any one-time funds to supplement revenue (drawing from the Betty May endowment, borrowing from the Unrestricted Endowment, etc.).

Part of the goals for this past year were to address two specific issues that have been problems with the financials: the outstanding debt to the Unrestricted Endowment, and the Youth Group debt. Both have been fully addressed, and are no longer issues:

- The full balance of $10,600 was repaid to the Unrestricted Endowment, closing out the loan from 2011. It is hoped that there will never be a future draw against this endowment, as it goes against its purpose (and prevents the money from earning investment income). This transfer was sourced from the Betty May fund.
- The Youth Group was in debt by approximately $6,000 due to a combination of factors related to the past New Orleans trip and the interim minister / youth advisor position. Fundamentally, Parish Committee felt that the debt was not the fault of the current members of the Youth Group, and voted to forgive the entire debt. This transfer was likewise sourced from the Betty May fund.

Finally, Parish Committee voted to fund new LED lighting for the entire church. The balance of the Betty May fund, after the two withdrawals noted above, is being used to fund the majority of the LED purchase. It is anticipated that the Betty May funds will cover $7,214 of the total $9,245 purchase price; the remainder will be funded from FY15 Building Maintenance funds. The LED lighting plan is estimated to save the church approximately $2,326 per year, meaning that there is only a one-year payback period for the use of the operating funds.

*The combination of these three actions has now exhausted the Betty May fund. On behalf of the Parish Committee, we extend our deepest gratitude to Betty May for her generosity on behalf of our church.*

**Building and Maintenance:**

FY15 has been exceptionally active in terms of the upkeep and improvements to our physical facilities. Part of this was related to the work that was done on the front entrance, and part was simply routine maintenance that may have been larger this year than other years. Physical improvements related to Rev. Catie’s arrival accounted for much of the Building/Maintenance charges, and landscaping work for the front entrance (most of which was not covered by the Fourth Century Fund) accounted for much of the Landscaping expenses. Both these categories significantly overran their budgets for FY15.

**Accomplishments in FY15:**

In addition to the points noted above (paying down the Endowment loan, re-funding the Youth Group, funding the new LED lights), several other accomplishments were achieved this past year. A summary:

1. A new Money Market fund was created at Citizens Bank, which allows us to earn interest on our money (approximately 0.5%). Initially funded at $50,000, it has earned nearly $150 which, while relatively small, is money that we would not have received otherwise.
2. Financial clean-up of a number of areas. Over time, QuickBooks is becoming a more reliable source of information, as incremental improvements are made to ensure the numbers are as accurate as possible. This process will continue next year.
3. Establishment of the escalation for the NCC rent. This is set by contract as taking effect on May 1 in each year 2015 - 2018, and is set as the lesser of the CPI-U Boston rate or 3.5%. The CPI-U Boston rate can be viewed at http://www.bls.gov/regions/new-england/data/consumerpriceindex_boston_table.htm and summarized at http://www.bls.gov/regions/new-england/news-release/consumerpriceindex_boston.htm. For FY16, the escalation will be 0.6% ($285 total for the year), using the January numbers; the same principle will apply for future years.

4. Historical analysis of trends. This includes bank account balances over time, actual pledge income versus budget, pledge income by quarter, etc. Some of these charts are included here. A few conclusions can be drawn, including the facts that a) we tend to collect within about 3% of expected income, and b) pledge income is paid both early and late.
FY15 Summary:
At the time of the writing of this report, Expenses are tracking to approximately $18,000-$20,000 over budget (primarily due to the exceptional Building expenses noted above). It is difficult to forecast Income accurately, as there can be wide swings month-to-month. These numbers are based on 11.5 months of actual data (full months for July 1, 2014 through March, 2015; partial month for April, 2015 including projections for expected expenses such as employee compensation).

If pledge receipt ends up at 97% of the $314,000 (i.e., at least $304,000 is collected), the overall year's deficit will likely be about $10,000. Full collection of pledges should result in close to balance. Note that the FY15 budget did not factor in a 3% fall-off in collections, so there is no cushion built into the numbers.

It is expected that a full accounting of FY15 would be possible approximately at the start of the 2015-2016 Church Year (in September 2015), at which time the final deficit amount (if any) would be known.

FY16 Budget:
All of the factors described above have been taken into account when planning the Fiscal Year 2015-2016 (“FY16”) budget. It is clear that parts of the FY15 budget were underfunded, causing unavoidable overruns (the physical building and landscaping being the most significant examples). Fundamentally, there are areas of the church that cannot be under-budgeted, because the consequence is simply to spend more than the budget. For example, many expenses under the Building are in this category. This has been factored into the FY16 budget, which is partly based on FY15 actual spending, rather than aspirational
spending. Additionally, it is rare to achieve 100% collection on pledge receipts, so a slightly pessimistic expectation of income is prudent.

Through the generosity of the congregation, responding well to the “Let’s Make It Unanimous … Again!” pledge drive, we project pledge and donation income receipt to be approximately $328,000 for FY16 (planning for a 97% collection rate of the total pledge commitment of $338,000). This is a 3.5% increase over FY14. An Auction is planned for FY16, which is expected to raise approximately $20,000. Additionally, we expect to receive approximately another $97,000 from various sources (building rental being the single largest source), for a budgeted total income of $444,937.

Our budget has expected expenses of $434,977, leaving $8,006 as unallocated (but spendable) contingency, and $10,000 as “net income”. Since the Auction is an every-other-year event, and since there are likely to be further expense increases next year (including due to the growing size of the congregation), this net income is intended to be rolled into FY17 (i.e., not spent in FY16), essentially spreading the Auction revenue over two fiscal years. Additionally, if we are able to collect greater than 97% of the $338,000 pledged revenue, the additional funds could be further applied to FY17.

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 expense detail per category on subsequent pages. Variance from FY15 budget is shown where there were changes. This budget was approved by the Parish Committee at the April 8, 2015 and April 26, 2015 meetings.

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 2015-2016 church year!
<table>
<thead>
<tr>
<th></th>
<th>FY15 Budget</th>
<th>FY16 Budget</th>
<th>Variance</th>
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<tr>
<td><strong>Bldg Rent - Ballet</strong></td>
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<tr>
<td><strong>Bldg Rent - Misc</strong></td>
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<td>$9,000.00</td>
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<tr>
<td><strong>Total Income</strong></td>
<td>$406,662.00</td>
<td>$444,937.00</td>
<td>$38,275.00</td>
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</table>

| **Expense**          |             |             |          |
| **Total Building**   | $79,905.00  | $85,830.00  | $5,925.00 |
| **Total Community Outreach** | $1,500.00 | $1,500.00  |          |
| **Total Community Within** | $4,650.00 | $4,650.00  |          |
| **Total Education**  | $79,029.00  | $81,176.50  | $2,147.50 |
| **Total Ministry**   | $92,387.00  | $106,778.00 | $14,391.00 |
| **Total Music**      | $44,004.00  | $49,164.00  | $5,160.00 |
| **Total Office/Governance Expenses** | $76,128.00 | $78,220.00 | $2,092.00 |
| **Total Denominational Affairs** | $18,217.00 | $20,113.00 | $1,896.00 |
| **Total Other Expenses / Contingency** | $10,842.00 | $8,005.50  | -$2,836.50 |
| **Total Expense**    | $406,662.00 | $434,937.00 | $28,275.00 |
| **Net Income**       | $0.00       | $10,000.00  | $10,000.00 |
## FY15 Budget vs FY16 Budget

<table>
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<tr>
<th>Income</th>
<th>FY15 Budget</th>
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<th>FY15 Budget</th>
<th>FY16 Budget</th>
<th>Variance</th>
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<td><strong>Building</strong></td>
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<tr>
<td>Description</td>
<td>2014-15</td>
<td>2015-16</td>
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<td>Youth Music Director Comp</td>
<td>$7,000.00</td>
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<td>Youth Music Director Payroll Tax</td>
<td>$532.00</td>
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<td>Music Accompanists/Singers</td>
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<td>Music Expenses</td>
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<td><strong>Total Music</strong></td>
<td>$44,004.00</td>
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<td><strong>Office/Governance Expenses</strong></td>
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<td>Admin Comp</td>
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<td>Admin Payroll Tax</td>
<td>$3,162.00</td>
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<td>Admin Health Benefits</td>
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<td>Admin Pension</td>
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<td>Admin Insurance</td>
<td>$600.00</td>
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<tr>
<td>Admin Professional Expenses</td>
<td>$200.00</td>
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<td>Office Equipment &amp; Copier</td>
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<td>Computer Hardware</td>
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<td>Computer Services &amp; Software</td>
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<td>Supplies</td>
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<td>Payroll Fees</td>
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<td>Postage</td>
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<td>Publicity</td>
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<td>Telephone</td>
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<td>Website Expense</td>
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<td>Stewardship</td>
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<td>Human Resources &amp; Recruiting</td>
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<td><strong>Total Office/Governance Expenses</strong></td>
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<td><strong>Denominational Affairs</strong></td>
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<td>Dues - Massachusetts Bay</td>
<td>$4,237.00</td>
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<td>Dues - UUA</td>
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<td>General Assembly</td>
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<td>Total Denominational Affairs</td>
<td>$18,217.00</td>
<td>$20,113.00</td>
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<tr>
<td>Other Expenses</td>
<td></td>
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<tr>
<td>Contingency</td>
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<td>$8,005.50</td>
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<td>Total Other Expenses</td>
<td>$10,842.00</td>
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<tr>
<td>Total Expense</td>
<td>$406,662.00</td>
<td>$424,937.00</td>
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<td>Net Income</td>
<td>$0.00</td>
<td>$10,000.00</td>
<td>$10,000.00</td>
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AUDITOR'S REPORT
Fiscal Year 2014-2015
Auditor: Gray Brown

Auditor Report

Fiscal Year 2014 - 2015
Auditor: Gray Brown

To the Members of First Parish Needham May 5, 2015

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 April 30, 2015 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
2014-2015 Fiscal Year
The First Parish in Needham, Unitarian Universalist
Summary of Endowment - Invested Funds
Prepared April 19, 2015 by the Trustees of Invested Funds
Eileen Vincent, Richard Eastman, Philip Murray

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 (CPA) 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.”

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. Church by-laws stipulate an annual spending plan, as described above. **Balance as of March 31, 2015 $207,088.62**

Ministerial Settlement – One of three purpose restricted funds from the Fourth Century Fund capital campaign. This fund is to provide financial assistance to our minister to purchase appropriate housing in Needham. Settlement of the note is to occur upon sale of house or 180 days after Rev. Scudera ceases serving as minister of FPC, whichever occurs first. **Principal as of March 31, 2015 $200,000.00**

John Buehrens Fund for Ministry and Youth – This is a purpose restricted endowment earnings only to be used to support the salary of the intern minister and/or youth advisor. **Balance as of March 31, 2015 $143,706.97** is net of $3,686.65 to settle final capital expenditures under the Fourth Century capital expenditure fund. The capital expenditure fund is considered closed at this time.

Music Endowment – Purpose restricted fund earnings only 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.” **Balance as of March 31, 2015 $37,083.45**

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. **Balance as of March 31, 2015 $23,871.93**
## First Parish in Needham, Unitarian Universalist - Endowment Funds

<table>
<thead>
<tr>
<th></th>
<th>Balance as of 4/30/2014</th>
<th>Disbursements</th>
<th>Contributions</th>
<th>Earnings</th>
<th>Balance as of 3/31/2015</th>
<th>Notes</th>
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<tr>
<td><strong>Music Endowment</strong></td>
<td>$34,187.50</td>
<td>(131.46)</td>
<td>2,162.00</td>
<td>865.41</td>
<td>37,083.45</td>
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<td><strong>Unrestricted Funds</strong></td>
<td>$191,655.69</td>
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<td>10,600.00</td>
<td>4,832.93</td>
<td>207,088.62</td>
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<td><strong>Memorial Garden Fund</strong></td>
<td>$19,925.92</td>
<td>(406.08)</td>
<td>3,795.00</td>
<td>557.09</td>
<td>23,871.93</td>
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<td><strong>Fourth Century Fund</strong></td>
<td>$93,610.39</td>
<td>(201,783.93)</td>
<td>255,567.16</td>
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<td>147,393.62</td>
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<tr>
<td><strong>Loan to Operating Fund</strong></td>
<td>$10,500.00</td>
<td>(10,600.00)</td>
<td>100.00</td>
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<td><strong>Total Market Value:</strong></td>
<td>$349,879.50</td>
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<td>$261,524.16</td>
<td>$6,355.43</td>
<td>$415,437.62</td>
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<tr>
<td><strong>Ministerial Settlement Fund</strong></td>
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<td></td>
<td>$200,000.00</td>
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<tr>
<td><strong>Total Trustee Accounts</strong></td>
<td>$549,879.50</td>
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<td>$261,524.16</td>
<td>$6,355.43</td>
<td>$615,437.62</td>
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</table>

### Investment Balances

- 3/31/15 Fidelity Statement ($147,959.10 less $536.02 due Operating account)  $147,423.08
- 3/31/15 UUA Common Endowment Statement (UUCEF) 268,014.54

**Notes:**

- Trustee have authorized a transfer to the Operating Fund for FY14 and FY15 distribution from the unrestricted Fund, in accordance with the Bylaws of the church. Payment of $7,148 will occur in April 2015.
  - FY14 amount is $2,680; balance is for FY15 adjusted for fiscal year change (3,830 + 638).
- Remaining balance of March 11, 2011 loan to Church operating fund was repaid in January 2015.
3 Final payment for Capital improvement portion of Fund will be paid in April (3,686.65). The balance plus any realized campaign pledge payments (outstanding balance of approximately $40,000 as of March 31) is restricted to John Buehrens Fund for Ministry and Youth.

4 Trustees will be making additional investments to UUCEF, reducing the money market balance at Fidelity, of $110,000 over the next two months.