# TABLE OF CONTENTS

WARRANT FOR CONGREGATIONAL MEETING .................................................. 4  
MINUTES OF THE 2014-15 ANNUAL CONGREGATIONAL MEETING ...................... 6  
RITES OF PASSAGE ......................................................................................... 10  
PRESIDENT’S REPORT ................................................................................... 11  
MINISTER’S ANNUAL REPORT ..................................................................... 13  
REPORT OF THE DIRECTOR OF RELIGIOUS EDUCATION ............................ 17  
REPORT OF THE MUSIC DIRECTOR ............................................................... 21  
ADMINISTRATOR’S REPORT ........................................................................ 23  
ARCHIVES COMMITTEE .................................................................................. 25  
COMMUNICATIONS COMMITTEE .................................................................... 25  
FRIENDS OF SOCIAL HOUR ........................................................................ 27  
GREEN CONGREGATION .............................................................................. 29  
THE HOMEGROWN COFFEEHOUSE ............................................................... 31  
THE LAURIE ANN GERBER MEMORIAL FUND ............................................ 32  
MEMBERSHIP COMMITTEE .......................................................................... 32  
MEMORIAL FUND AND GARDEN COMMITTEE .......................................... 34  
COMMITTEE ON MINISTRY ......................................................................... 34  
MUSIC COMMITTEE ....................................................................................... 35  
NOMINATING COMMITTEE ........................................................................... 36  
PASTORAL CARE TEAM ............................................................................... 37  
PROGRAM COUNCIL ..................................................................................... 38  
PROPERTY COMMITTEE .............................................................................. 39  
RACIAL JUSTICE TASK FORCE .................................................................... 40  
RELIGIOUS EXPLORATION .......................................................................... 41  
SOCIAL ACTION COMMITTEE ...................................................................... 42  
WORSHIP COMMITTEE ................................................................................ 44  
YOUTH ADULT COMMITTEE (YAC) ............................................................... 45  
FINANCE COMMITTEE .................................................................................. 48  
AUDITOR’S REPORT ....................................................................................... 58  
TRUSTEES OF INVESTED FUNDS ................................................................. 59
WARRANT FOR CONGREGATIONAL MEETING
FIRST PARISH IN NEEDHAM, UNITARIAN UNIVERSALIST

SUNDAY MAY 15, 2016 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 15, 2016 at 7:00pm then and there to act on the following articles, to wit:

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

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

As President – Gail Hedges
As Vice President – Beth Sargent
As Treasurer – Erik Bailey
As Clerk – Marguerite Robbins
As at-large member – Kristin Neff
As at-large member – Joan Mecsas
As at-large member for one year – Geoffrey Austrian

And to elect the following candidates for the listed positions:

For Nominating/LDC: Alan Robins, Amy Brown
For Trustee: Gray Brown
For Auditor:

ARTICLE III To authorize the Parish Committee to appoint up to six 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 2016 – 2017.

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

ARTICLE VI To conduct such further business as is necessary.
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 April 15, 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 2014-15 ANNUAL CONGREGATIONAL MEETING

The meeting came to order at 7:36 PM. 77 members were in attendance, which comprised a quorum of more than 15% of the membership.

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

A motion was made to approve the minutes of the 6/18/14 annual meeting. The motion was duly seconded and unanimously approved.

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

President, Wendy Blom: Wendy spoke of two years serving as president during this transition from an interim a new installed minister, Rev. Catie Scudera. She also spoke of other staff transitions, as this was the first year of a new musical director, Irina Georgieva, and the second year of a new church administrator, Susanna Whitman. She thanked the many folks involved in that transition. She then informed the congregation about the decision to hire a sexton and cleaning person to ease the burden on Susanna, the social hour volunteers, and the property committee. She envisions that the new arrangement will solve some chronic problems with allocating upkeep to the building and infrastructure.

Wendy discussed the current actions of the Parish Committee to create a new strategic plan for the church. With the help from the newly-reconstituted Committee on Ministry, we held several meeting both during and after services to brainstorm new ideas and directions. The following broad goals will provide a road map for a more formalized strategic plan to be developed this year:

1. Growth. With an eye to diversity and retaining and developing our current members while appealing to those who are not fully represented in our church community through worship, music, and programming. We will have to be flexible about dealing with the size of the sanctuary, which is already often too crowded to be fully welcoming to newcomers.
2. Financial stability by cultivating a culture of abundance and generosity so we can support our dreams.
3. Making social justice central to our identity, activities, and programs. We intend that the sub goals under this will include continuing our ongoing work on the environment, welcoming congregation, and racial justice.
4. Expand multi-generational opportunities to engage in fellowship, spiritual growth, and service for our children, youth, adults, and elders.

Lastly, Wendy discussed the recommendation from the social action committee and the green congregation committee to have First Parish sign on to the Commit 2 Respond initiative to address global climate change. She talked briefly about the group’s goals and recommended a formal congregational vote in the autumn.

Minister, Catie Scudera: Rev. Catie commented on her first year at First Parish Needham. She outlined her goal to visit all households in the first year and is close to completely that quest. She reviewed what she believes are our church’s strengths and looks forward to using this next year to focus on strategic goals to build upon them.

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

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 UUA General Assembly.

Wendy explained that the Article was mistaken and should state five delegates rather than three delegates. A motion was then made to amend this Article to read five delegates rather than three delegates. This motion was seconded and opened to discussion. The motion to amend was unanimously approved. The motion to appoint five delegates was seconded and passed unanimously.

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

As Treasurer, Erik Bailey led the discussion of the church finances. He first discussed the ramifications of changing the fiscal year from May-April to July to June. This created a “stub year” (May-June 2014), which make year-to-year comparisons slightly more challenging. Overall for FY2013-2014 (May-April), income was on target and expenses came in slightly under budget; thus we had a small surplus. However, very little pledge income came in during the stub months of May and June, but we still incurred expenses for salary, building, and other overhead costs. For FY2014-2015 (July to June) we are almost through the fiscal year. Revenue is on target, which reflects slightly below expectations for pledges but slightly higher in other like fundraising through the mini-auction and talent show. However, expenses are over budget, especially concerning the building, landscaping, and irrigation. Erik projected a $10k deficit for FY2014-2015. However, this deficit includes several items that cleaned up our finances: we repaid a loan from the endowment, covered a youth group debt from years past, and authorized the purchase of LED lights which will lower our electricity bills in the future. Erik and Susanna are working together to continue to clean up the accounts. Overall, we can handle the deficit for FY2014-2015 from the balance in our bank account, but need to be careful going forward.

Erik then presented the FY2015-2016 budget. For the first time in several years, we have a budget that hasn’t used one-time funds from the Betty May bequest to supplement the budget, but rather is based solely on the actual spend. The budget includes merit raises for almost all staff.
A question was asked about whether plate offerings that are intended to go to other causes count as church revenue. Because it comes from our church, the congregant added, we need a way to make that a part of our identity. He argued that should think about what the church gives outside of ourselves as a percentage of our budget. We should think about our relationship with the world. We should set a goal of ourselves that we live up to. Erik responded that we don’t count it as income and expenses. It does pass through our checking account. But not true church revenue. We have those numbers in actuals. But we don’t list that. Rev. Catie estimated that we give away $600-$800 every time we allocate the plate to a cause. Because that is more than a regular Sunday, many other churches “share” the plate every week, giving away 50% of the plate. Most churches have found that the shared plate doubles, so the church breaks even theoretically. She plans to take it to Parish Committee next year to discuss. Another congregant agreed, but wants a report in the Bellman about what we have collected each week for these causes, including what we give to UUSC, etc.

A question was asked about whether donations and pledges can be targeted to specific areas, such as small group ministry. Erik responded that the PC can accept donations into the general operating funds. In some cases, there exists a special endowed fund, like for Music. But we cannot accept restricted donations to a specific cause.

Erik then walked through the budget for FY2015-2016. A motion to approve the FY2015-2016 budget as presented was made and seconded. There was no discussion and the motion passed unanimously.

ARTICLE V: To approve the Mission and Vision of First Parish in Needham as proposed by the Parish Committee:

Wendy read the mission and vision, listed below.

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.

A motion was made to approve the Mission and Vision statements as approved by the Parish Committee. The motion was seconded and there were no volunteers for discussion. The motion passed unanimously.

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

No other business was presented at the meeting.

The Bell Awards were given:
1. Marianne McGowan presented an award to Buffy Duhig.
2. Beth Sargent presented an award to Tom Gehman.
3. Darren Zinner presented a bell award to Priscilla Mullins
4. Erik Bailey presented a bell award to Amy Brown.

There was no further business.

A motion was made to adjourn, duly seconded and unanimously approved, and the meeting was adjourned at 8:13PM.
RITES OF PASSAGE

NEW MEMBERS

Sarah Lammert          Julie Bryan          Will Innis
Susan Camuti           Vicky Makrides       Andrea Goldberg
Eva Jansiewicz         Klaus Hager          Wendy Rands
Peter Farrow           Mary Johnson         Patrick Rands
Katherine Calzada      Rebecca Malakoff     Lucy Zendzian
Grace Rising           John Petrovato       Kate Murray
David Berman           Martin O’Connor

With these new members, we also welcomed spouses and many children.

Total membership as of 5/6/2016: 270

DEATHS

Suzon “Suzie” Lowe
Fay Linden
Timothy “Timmy” Stetson

Our summer minister, Sean Neil Barron, officiated Suzie Lowe’s memorial service in July 2015. We honored Fay Linden’s and Tim Stetson’s life with services in September 2015. This year, we also mourned with many First Parish families at the loss of their close family members and friends.

MARRIAGES

Rod Ott and Jean Maxwell

We were happy to host the wedding of long-time member, Rod Ott, to his wife, Jean Maxwell, on September 19, 2015. We celebrate with our First Parish members and friends whose children and grandchildren are getting married this year.

BIRTHS AND DEDICATIONS

Graydon Vincent

Graydon was born in February 2015 (blessedly, in between snow storms) to one of our “graduated” youth members, Chris Vincent, and his wife Jackie. With his grandparents (including First Parish’s Eileen and Rick Vincent), aunts and uncles, and many friends, we dedicated Graydon on November 15, 2015. We celebrate with our many First Parish members and friends who have welcomed grandchildren into their lives this year.
PRESIDENT'S REPORT  
by Gail Hedges

At the May, 2015 Annual Meeting, we welcomed three new members to the Parish Committee. Eliot Jekowsky, Susie Smart, and Mary Ellen Menken joined Beth Sargent, Jen Robins, and Katie Edwards. I became President joining officers Don Leathe (Vice President), Erik Bailey (Treasurer), and Darren Zinner (Clerk).

An in-house retreat in the fall focused on completing a five-year strategic plan. While the final details are still a work-in-progress, we are committed to having a complete plan in place in the next few months and measuring our progress against it regularly, adjusting specific actions to reach the main goals set in the plan:

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

We began a trial year of theme-based worship, weaving a monthly theme into as many activities at First Parish as possible including Religious Education, Continuing Education, Youth Groups, Small Group Ministry, and some social events. We also committed to a trial of sharing the collection each Sunday in lieu of donating the entire plate one Sunday a month. Seemingly against logic, the share-the-plate trial increased giving, benefitting First Parish as well as local and worldwide neighbors.

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

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

A Safe Congregations task force began meeting to establish policies and practices to meet various emergency situations. Our successful, first-ever fire drill demonstrated the importance of this planning. This group continues to work on ways we can be safe, and the staff has established guidelines for emergency (weather) closings and the more upbeat guidelines for wedding rentals and other occasions.

Our building is buzzing with First Parish and Temple Beth Shalom activities. We gladly continued our long-term mutual support by welcoming Temple members while their building project progresses much as they welcomed us during our renovations several years ago.
Finally, 2016 found us leaping and sticking froggy stickers on charts as the Stewardship Committee urged us to recognize Leap Year with incremental increases of $366 to our annual pledges. Many were able to meet this playful challenge and our FY2017 budget, if accepted at the 2016 annual meeting, will allow us to move forward on some long-held financial goals. Many thanks to Dave Mackey, Erik Bailey, Katie Barnett, and Darren Zinner for their hard work on the Stewardship drive—and for their sense of humor!
MINISTER’S ANNUAL REPORT
by Rev. Catie Scudera

Nearing the end of my second year at First Parish, I feel that we are hitting our stride together, especially as we get serious about our five-year strategic goals. Last year, former president Wendy Blom shared four goals at the Annual Meeting, goals that had been developed over months of sharing, dialoguing, and dreaming together through surveys, one-on-one conversations, and small groups. You’ll find these four goals resonating throughout my report, because we have already begun our progress toward accomplishing these goals by the year 2020: growing our membership, securing our long-term financial stability, making social and environmental justice central to our collective identity, and deepening our multigenerational fellowship and learning opportunities.

There is much that is going exceedingly well at First Parish. Our lay leaders are dedicated to the programming and maintenance of our church community and building, and the staff team continues to strive for excellence in their service to the congregation. I’ll lift up a few of these successful endeavors and programs here.

You’ll read a lot about our religious exploration program in Mark’s report, as he is the staff lead for our RE offerings from our nursery babies up through our elders. I’m impressed with the proposal he and the RE Committee have offered to modify our junior high school RE offerings, especially to give more time to the Coming of Age curriculum. In addition to Mark’s report, I want to lift up some of the successful partnerships between Continuing Education and other committees: the Pastoral Care team (three programs on death and end-of-life care, a program on suicide prevention, and the revival of monthly UU worship at North Hill); the Racial Justice Task Force (New Jim Crow lecture and dinner discussion, Lyceum on the film Race, and workshops and small groups about the books Between the World and Me and Waking Up White), Green Congregations (Just Eat It film showing and dinner discussion), Social Action (Lyceums about the West Roxbury Lateral pipeline and other justice issues). I was also glad to have my spouse asked to lead lectures and discussions on Islam to very-full Lyceum audiences and to our senior youth group.

As Mark mentioned in his report and I want to highlight again, we need more lay leaders to join the core Continuing Ed team, and we need them now. That committee has significantly dwindled in number since 2014, and we need new leaders will step in to help coordinate our Lyceum series and adult education opportunities. This is essential for us to continue forward with our goal of expanding multigenerational opportunities. We actually have plenty of committees and individuals excited about facilitating and organizing specific continuing education events and series; who we need are some folks excited about hosting and scheduling these opportunities. I do want to thank the Nominating Committee for going beyond their bylaws-dictated purview to do initial outreach for new members of Continuing Ed, as well as for some other “understaffed” committees.

Our Music program continues to thrive under Irina and Kate’s leadership, with stellar support of our Music Committee and the musicians and singers of our congregation. I have been particularly impressed by how many church members and friends have come out of the woodworks to collaborate with Irina and Kate on unique, diverse musical offerings. (Offerings of music is one of many ways our fabulous lay leaders add to our worship experience; we have all loved the worship leadership of our senior youth, youth group alum, Green Congregations, Budget Drive team, guest testimonials, and Ed Lane.) And, it’s been a great blessing to have such musical talent amongst ourselves during a surprisingly lean budget year.
for hiring professional musicians, because the music program spent much of its budget on the moving costs and acquisition of two beautiful, new-to-us grand pianos—with deep gratitude for the generosity of the Boni and Lorimier families. Especially now in retrospect, I am very thankful that so many people added to their 2015-2016 pledges so we could give more to our music budget lines; the moving costs for the pianos were significant, and without the extra pledge money we would not have been able to afford our wonderful soloists who have supplemented the excellence of our adult choir. We are also still indebted to the generosity of Linda Kenerson for covering the costs of fixing up our organ, which we have been able to hear regularly in worship since its repair in the fall.

The administration of the church continues to offer unusual challenges—with technology seems to always come some problems, and we are still tackling some issues lingering in administration from before Susanna’s time with us. For example, Susanna and Carl Franceschi worked for months to greatly reduce an originally $9,000 inspection fine from the Commonwealth from almost three years ago. And, we still struggle with some technology issues, the most obvious of which has been our email server. Early this church year, Kim Lorimier helped me solve an email forwarding problem that resulted in finding one hundred undelivered emails; at the time of writing this report, we’ve also discovered that Mark’s @uuneedham.org address has also not received some emails as of late. The Safe Congregations Task Force’s work has moved slowly, as it’s a big task to tackle. Through that team, we did have our first all-church fire drill in years (… perhaps ever!), and Don Leathe has been inspired to do more work on compiling and organizing our congregation’s current, scattered collection of policies and procedures.

We’ve struggled for years with fundraising, financial transparency, and accounting at First Parish, but all those struggles seem to be on the decline. With many thanks to our Trustees, especially Nancy Simpson Banker, we have tied up some loose ends from the Fourth Century Fund campaign and now have plans to launch new programs to advertise and increase our endowed funds beginning in the next church year. Our congregation has felt pinched by its budget in recent years, but our Budget Drive team, auction team and other fundraising organizers, and your generosity to “leap for First Parish” has added $40,000 to our overall budget between 2014 and 2016. That’s a huge number, and you should feel proud! This year, we have the opportunity to bring staff salaries close to recommended levels, stabilize our Property budget, and budget for a contracted bookkeeping service to reduce the duties of the parish administrator to a reasonable number. These are all great first steps toward our goal of financial stability. We should also feel proud that we have moved successful to a “split the plate” model for our weekly offering plate; Susanna and our treasurer, Erik Bailey, confirm that we have doubled our usual collection numbers, meaning that while First Parish has kept the same amount of money for itself, we’ve given away more than twice as much to outside organizations through our plate collections.

Speaking of social justice, we have had an amazing and full year of social justice engagement and education. Social justice may not be core to our identity as a church yet, but we are well on our way to making that a reality by 2020. I implore all of you to read the reports from Social Action, Green Congregations, the Racial Justice Task Force, and the relaunched Welcoming Congregations team to see what an impact our church community has made. We’ve done so much to live into our Commit2Respond endorsement—from educational events about food waste and fossil fuels, to participating in climate justice and anti-pipeline demonstrations, to lobbying our local officials for green energy, to partnering with other congregations and community organizations like the UU Urban Ministry and ACE (Alternatives for Community and Environment). We’ve supported our Needham Community Council food pantry and the residents of Needham Public Housing. And, we’ve creatively promoted our First
Principle of the inherent worth of every person through signage: our welcoming, Arabic wayside pulpit signs first posted in December and our new “all-gender” inclusive bathroom signs put up in March. We received a lot of positive feedback from the wider community about our Arabic wayside pulpit signs, and I recently had a visitor attending a piano recital thank me personally for our new bathroom signs, shaking my hand and saying, “It makes a big difference.”

As of the writing of this report, we have welcomed twenty new members to the congregation, representing many families. Some of these new members have been “friends” of the church for some time, others are brand new to our faith community, and one is a member of our senior youth group. First Parish had its largest modern membership in the midst of Rev. John Buehren’s ministry, at 275 members; as of May 2016, our adult membership is 270 members, with over one hundred children and teenagers registered with our religious exploration program. We are well on our way toward our goal of growing our membership! Our Membership Committee has done great work to make every visitor feel welcome, and to ensure everyone considering membership has opportunities to learn more about our congregation. Every current member or friend who has smiled and said “hello” to someone with a red cup at social hour, or welcomed an unfamiliar face to join at their table or pew at fellowship events and worship should give themselves a pat on the back as well for creating a welcoming atmosphere for newcomers. Now that I have accomplished my goal of extending a “getting to know you” invitation to all members and friends of the church who were part of the community (and listed in Realm!) when I arrived in August 2014, I too will be doing my part of meeting with our incoming members and friends. The Membership team is also excited about working with other committees of the church, such as Communications and Continuing Education, to begin advertising ourselves in the wider community—for all those folks who might say, “I’ve always been UU, but never knew it!”—and to improve our “retention rate” of current members through leadership development, spiritual growth opportunities, and fellowship.

But, I have a theory that our congregation can’t grow to be more than about 275 adult members, so long as our seating capacity on Sunday morning in our historic meetinghouse continues to be just 230 people. If we do mean to accomplish our goal of membership growth, one of our toughest challenges ahead will be solving the problem of the size of our sanctuary. We may need to squeeze closer together in the pews to start physically making more room for newcomers—and then much more will have to be considered in worship, membership development, and fellowship if we’re going to break through to 300 active adults in our membership.

Before I write a bit more about what I’ve been doing in my service to the wider community and to improve my skills as your minister, I’d like to lift up our incredible staff team as instrumental in the successes of our worship services, programs, and administration. I want to especially compliment both Susanna Whitman and Mark LaPointe for bringing on board and supervising our four new part-time staff members: Freddy Soto, Michael Caramanica, Jen Duhamel, and Sophie Hadingham. I’ve appreciated everyone on staff’s commitment to excellence in their work, to the church community as a whole, and to one another: showing up for our monthly all-staff gatherings, collaborating with many church members to accomplish what the church needs done, and stepping up when other staff members have been ill or had family emergencies.

In my role as “parish” minister (if we think in the 1700’s way of the town of Needham being “the parish”), I have attended and participated in many town and Greater Boston events: the dedication of the Own Your Peace installation at Needham High; the Needham Diversity Summit (along with twenty First Parish members and friends); the Needham Community Farm auction; the ACE annual meeting; an anti-
gun violence summit for clergy and government officials held at Andover-Newton Theological School; the annual Interfaith Thanksgiving Celebration, hosted this November at First Parish; the lighting of the Blue Tree; the Needham Martin Luther King Day celebration; a town-sponsored forum about Islam; the League of Women Voters meetings about campaign finance reform and the “teardown epidemic”; an environmental justice forum at the UU Urban Ministry; a lecture from eco-activist Naomi Klein at Babson College (again, with twenty First Parish members and friends); and, Needham Open Studios. I am especially proud of the Needham Clergy Association for submitting a strong letter to the Needham Times this winter to denounce Islamophobia.

To improve my abilities as your minister, I continue to regularly participate in UU collegial gatherings: the Mass Bay District ministers’ meetings (at which in January I led worship) and retreats, the local UU ministers’ Bible study, and webinars and workshops on stewardship, congregational family systems, and internal family systems. I have also joined a “ministerial study group” that meets twice a year to discuss topics of both intellectual and practical interest to ministers, and continue to serve on the Board of the UU Partner Church Council. As a last note, by the time of our Annual Meeting, I will have just given “the response” at one of the annual Minns Lectures sponsored by First Church in Boston and King’s Chapel.

I wrote last year that I (and Irina) were looking forward to the 2015-2016 church year, because we’d have done almost everything at least one time around! I’m now looking forward to “Year 3” when we start in earnest making changes and shifts to achieve our strategic goals, after this year of gestating and planning. My ministerial colleagues have told me year 3 can be tough in a ministry—the “honeymoon period” after the call and installation ends and we (the minister and congregation) begin to see each other’s growing edges, sometimes leading to greater conflict and negativity in the church. I hope we can be an exception to such a rule and still revel in each other’s strengths, commit ourselves to spiritual growth, and focus on what’s going right instead of what’s going “wrong.”

I will miss you while I’m gone this summer, and promise to come back to you refreshed and renewed for the shared ministry of our faith community. I am taking study leave in Maine and perhaps (again) at a monastery. I’ll be convening with colleagues at the UUA General Assembly in Cleveland in June and the Young Women Clergy Project’s conference at Boston University in July. My spouse and I will have a vacation with the Scudera side of our family to Alaska in August, and may be driving our new puppy Mango down to meet the Scuderas and Stephensons before the summer ends. I’ll return to First Parish full-time on August 22nd, and look forward to seeing you at Ingathering Sunday on September 11th.

Blessings,

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

OVERVIEW: Religious Exploration at First Parish is robust and growing at all levels with an increasing emphasis on connecting more fully to the complete community through themed ministry, multigenerational worship and special programming. There have been some key areas of challenge this year, most notably around staffing and administration and there are some new opportunities and plans on the horizon. Below I highlight some of the key accomplishments of the year as well as note some areas of change, growth and challenge.

ADMINISTRATION: This year began with a particular challenge as our three part-time, but vital, RE Staff (Nursery Coordinator, RE Program Assistant, Youth Program Coordinator) resigned for a variety of personal and professional reasons. Of particular note, Amy Brown (the last congregant also on the First Parish staff team) gave notice after many years of outstanding work and dedication and I can’t thank her enough for her work here which has been invaluable to my own efforts. It is also worth highlighting that we’ve been good stewards of church resources, keeping well within the RE budget allocations.

For a number of reasons, most notably the off-cycle hiring schedule, it took some effort to find the highly qualified staff that would best fit First Parish and its needs. I want to thank Amy Brown who continued to contract with us to help cover some of the essential gaps in our children’s RE program and the several folks who stepped forward to help keep our two youth groups active and alive during the interim, including Liz Rover Bailey, Marianne McGowan, Kristin Neff, Andy Jones, Tony Cicala, Priscilla Mullin and Reverend Catie as well as many parents who volunteered time and resources.

I am extremely pleased that we’ve now hired Jen Duhamel as our RE Program Assistant (also coordinating our childcare) and Sophie Hadingham as our Youth Program Coordinator. Each has been an excellent addition to our program and has taken on the various challenges of coming in mid-year very well. Their gifts are much appreciated by the many people with whom they work, including me.

I must also share a personal note with you. The staff shortage was personally challenging for me as it meant taking on additional tasks and responsibilities in order to keep our programming solid and the extra time and stress did ultimately impact my health and my work, to some degree. With much help from my colleagues and a number of key program volunteers, we found ways to keep our programming solid while also allowing me to work on self-care needs I’d been neglecting. I am grateful to work in such a supportive community.

RELIGIOUS EXPLORATION FOR CHILDREN AND YOUTH: As is typical, enrollment in our RE program has been on a slight incline. While we continue to bring in a notable number of new families and children, there is always some attrition as people move away, teens graduate, or they leave our community for other priorities. At present, we have 110 children and youth in our programs ranging in age from 2 to 18. We are currently providing classes from Preschool through 8th grade (with a combined 3rd/4th grade), two Youth Groups, and our Milestone programs. We also offer occasional Children’s Worship opportunities, multigenerational worship, and special programming such as the Festival of Lights and the Spirit of Earth Month (in partnership with the Green Congregations team). The RE program is guided by the Religious Exploration Committee who works in close partnership with me to oversee curricula, support/celebrate teaching, encourage social justice work for children, plan family programming, and develop policy. This year’s co-chairs Laura Long and Jen Packard, have done a great job serving as the congregation’s voice in our wonderful children’s program. This year, they offered a
wonderful evening social opportunity to our 40-plus volunteer teachers to thank them for their dedication, something that will likely become an annual event at First Parish.

**FAMILY & MULTIGENERATIONAL PROGRAMMING:** We continue our focus on bringing together people of different ages and generations through a number of programs. Most notable is our Parenting Your Children (PYC) program which offers a monthly social/educational gathering for families with younger children. Lead by a steering committee of Katie Edwards, Liz Campbell and me, PYC attempts to highlight parenting topics within the context of Unitarian Universalism while fostering relationships among congregants at similar points in their lives.

Also of note, the RE Committee hosted the highly successful annual Karaoke Night (many thanks to Jim Long) and Peter Farrow and Eva Jansiewicz launched a monthly multigenerational game night, adding to our assortment of fellowship opportunities. There has also been a noticeable effort to include a broader range of age groups in many of the ongoing and emerging programs at First Parish, demonstrating a strong commitment to children and youth here.

**YOUTH PROGRAMMING:** First Parish also shows a strong commitment to its youth by maintaining two, very active youth programs, coordinated by Sophie Hadingham, Priscilla Mullin and the Youth Adult Committee (YAC). Highlighting social action, spiritual exploration, fun and fellowship, the youth programs serve an important part of our community and help young people to stay connected to their church home even after they age out of our regular RE classes. Kristen Neff has done an amazing job chairing YAC and is stepping down at the end of this year. Marianne McGowan will take on this important leadership role, working with youth, parents and the broader First Parish community to ensure we have an excellent program for our teens. A highlight of the year, as always, was the annual service trip. This year, youth raised funds (kudos to their hard work) in order to travel to New Orleans where they worked with our longtime partner, the Center for Ethical Living and Social Justice Renewal (CELSJR). This year’s trip was led by Kate Campe and chaperoned by Reverend Catie, Sophie Hadingham, Marianne McGowan and Priscilla Mullin.

I am encouraged by Sophie’s focus on social justice and her many connections to the broader progressive community in the Boston area. She is a creative and caring leader with great experience and enthusiasm. I am happy to report that the youth have responded quite positively to her leadership and I look forward to working with her on next year’s program.

**ADULT PROGRAMMING:** Many thanks to Phil Lynes who will be stepping down as the chair of the Continuing Education Committee this year after several years of dedicated service and to the many volunteers who have made programming for adults ever more vibrant at First Parish. Our adult RE foundation, The Needham Lyceum, has continued strongly this year with many successful presentations by community leaders, church members and others sharing on a broad variety of topics. We’ve had at least a couple of Lyceum events where attendance has exceeded the capacity of the parlor and we can be quite proud of this program and the volunteers who have put many hours into its success. Joining the programming this year has been a “Big Topics” discussion group led by Tony Cicala and Tad Staley, a Mediation group lead by Vincent Cho and Lyn Jekowsky (with help from Kitty Cox and Pat Banker). Reverend Catie and I also introduced a UUA adult curriculum, “The New UU” to the community with three sessions and 10 participants. Other adult and multigen opportunities at the church include the ongoing Positively Aging program, small group ministry, book group, neighborhood dinners, and many
other programs spread throughout the church. With fuller staffing in place, I plan to meet with these groups and work to align and promote all of our adult offerings more fully in the next church year.

**OPPORTUNITIES AND CHALLENGES**

Although we are faced with a number of challenges and are taking on several new opportunities, I highlight the most exciting and most pressing here.

- **New curriculum map for older children/youth** – The RE Committee and I have identified some needed changes to our Sunday School program for grades 6 and above. This will include the addition of a 9th grade year for the Coming of Age program, a “Big Questions” course for 6th graders, the introduction of a new “Neighboring Faiths” course for 7th graders and the moving of the OWL course to the 8th grade. The changes are in keeping with best practices developed by the UUA and other churches and will be rolled out over the next few years as explained in the accompanying document.

- **Children’s Worship & “Off” Sundays** – Both a challenge and an opportunity, we’ll be taking a new look on how to best manage Sundays when there simply aren’t enough volunteers nor children to run a full RE program (the Sunday after Thanksgiving or during school vacations are good examples). One strong possibility is to draw upon Jen Duhamel’s training and experience in Family Ministry to introduce a new series of Children’s Worship/Workshop opportunities. This will require some funding from the RE budget and, more importantly, some volunteer effort to support Jen.

- **Continuing Education Committee** – With Phil’s departure and a dwindling committee membership, this is a key challenge for the congregation. We need strong leadership to work with me and volunteers to reimagine the committee’s mission and goals. The church’s beloved Lyceum program cannot continue to run successfully without dedicated volunteers and we need to develop a stronger coordination among all adult oriented programming. **This is a high priority!**

- **Youth Group Service Trip** – Our youth have been traveling to New Orleans on a semi-regular basis ever since Hurricane Katrina devastated that community and highlighted ongoing, systemic needs. The trip is incredibly valuable for our youth and provides some much needed person hours for New Orleans’ non-profits, but is increasingly more and more expensive, especially related to travel costs. The Youth’s fundraising efforts are stronger than ever, particularly with the addition of online fundraising and the monthly Soup Sundays. Yet, fundraising and family contributions simply do not cover the costs sufficiently. We will have to take a hard look at this trip and its value to the church as a whole. While we think of it as “the youth trip,” the teens are actually ambassadors of First Parish and the work they do is a part of our Social Justice efforts overall. Possibilities include more funding from the church, traveling to New Orleans less frequently, or dropping the trip altogether.

- **RE Teacher Recruitment** – Each year, we are challenged to fill 40 volunteer teaching spots in our children’s Sunday School program. In a couple of years, this will increase to at least 42 with the addition of a 9th grade year. We operate on a “Coop Model” which requires parents to volunteer. This is an adequate model, but is no longer seen as the best option in our UU churches. As our program grows and we have more children, this is likely to become an even greater challenge (as is space). We need to find more ways to support these volunteers and to encourage non-parenting adults to participate more fully in this mission.

This is a long report, but still just touches upon the many things going on in First Parish Lifespan Religious Exploration. As always, I welcome comment and question.

Respectfully submitted,

Mark LaPointe, Director of Lifespan Religious Exploration
First Parish in Needham, Unitarian Universalist  
Religious Exploration for Children

Reasons for change:

1. **Coming of Age** becomes a year-long program, allowing for greater exploration and depth
2. Moves **Neighboring Faiths** (now called **Building Bridges**) one year later to take advantage of typical developmental growth. The new curriculum is also aimed at older youth and really amps up some of the things we like about Neighboring Faiths.
3. **Our Whole Lives** will move completely to the 8th grade year, also allowing for a bit more developmental growth. It also gives us more options to partner with other churches who often do OWL this year instead of in 7th grade.
4. Introduces a new course, **Riddle and Mystery**, at the 6th grade level. This program focuses on “Big Questions” and along with the courses that follow, helps to provide a foundation for spiritual exploration and growth that should prove fruitful in the Coming of Age process.
5. These changes keep us more closely in line with other churches of our size and draw upon some great new curricula developed by the UUA.

These changes will be introduced over the next three years as follows:

### CURRENT SCHEDULE

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2016-2017

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REPORT OF THE MUSIC DIRECTOR

By Irina Georgieva

Instrument donations

In the fall of 2015 First Parish received a generous gift from the Boni family: a 7-foot concert grand Samick, which replaced our 100-year old sanctuary grand piano. Also in the fall, Sue Lorimier sold the church one of her two baby grand pianos: the Kohler Campbell, which is now in at Parish Hall. The Knabe, our old parish hall piano was moved to the music room and the old sanctuary piano was sold. The move of the four pianos took place on December 3 and was coordinated by the co-chair of the Music Committee Becky Siebens.

Musical experiments

The music committee at First Parish has actively been working on enhancing the musical experience at worship by implementing new musical elements such as gathering music: a brief instrumental selection played immediately before the beginning of the service; and song-leading for the hymns, which has often been done by Beth and Jim Sargent and Kate Loftus Campe, and somewhat less frequently by the professional members of the choir. The changes have received a very positive response by the congregation.

Christmas

The First Parish Music committee with the leadership of Becky Siebens and former member and committee co-chair Emily Weiland organized a family carol sing-along at the Parish Hall which was led by Kate Loftus Campe and Jim Sargent.

Thanks to last year’s the generous donation by Linda Kenerson, the organ was repaired in time for Christmas.

The early Christmas Eve service featured the SongSquad, The UURingers and Jim and Beth Sargent. UURingers played Jingle Bells arranged by our own Kate Loftus Campe. The SongSquad sang Christmas Time is Here, Jim and Beth performed together Wexford Carol and God Rest Ye Merry Gentlemen, and Kate and Beth sang Brightest and Best.

The late Christmas Eve service featured the adult choir, which presented a collection of carols from various eras.

Easter

During the early Easter service, the SongSquad sang Fight Song by Rachel Platten and Come, Let’s be Singing. Kate performed The Shepard of my Soul by Sally DeFord and the UURingers closed the service with Passion Chorale, arranged by Kate. During the late Easter service, the adult choir along with the soprano Michelle French and the tenor Justin Lundberg performed five movements from Vivaldi’s Gloria. Sue Lorimier accompanied.

Music Sunday

Music Sunday, which this year takes place on May 1, features the SungSquad, the UURingers, and the adult choir. The musical selections will include three traditional spirituals and four settings by the Unitarian composer Elizabeth Alexander.
SongSquad and UURingers

The First parish youngest ensembles continued to grow musically under the direction of our Assistant Music Director Kate Loftus Campe who skillfully has arranged music of various genres and traditions. Her musical leadership has nurtured the young musicians and helped them sound their best while having an enjoyable experience. Some of the highlights of this year were: *We Are a Circle* by Ellie Rolnick, *Monster Mash* by Bobby Pickett, *You Are You*, the Pachelbel’s *Canon*, and *I Can See Clearly Now* by Jonny Nash.

First Parish Singers

Under the director of Jim Sargent, First Parish Singers have continued to bring diversity to the First Parish’s music program. *Homecoming* by Jim Sargent has become a traditional anthem for ingathering. Other songs with which First Parish Singers has contributed to the themes of the services include: *River* by Bill Staines, *Paradise* by John Prine, *Across the Universe* by Lennon-McCartney, *Swinging on a Star* by Jimmy van Heusen, *I Love Myself the Way I Am* by Jai Josephs, *The Color Song* by Patricia Shih, and many others.

Adult Choir

The adult choir this year acquired three professional singers: Michelle French, Janelle Holister, and Justin Lundbers, which have been singing semi-regularly. The anthems featured by the choir included a collection of Jewish setting for Rosh Hashanah, *The Silver Swan* by Robert Harris for the blessing of the animals service, *As Rain From the Clouds* by Jonathan E. Spillman, *Locus Iste* by Bruckner, *Grant Us Piece* by Mendelssohn, *Jesu Dulcis Memoriae* by Victoria and others.

Music provided by First Parish members

A large number of First Parish members have contributed their musical gifts during worship including Cassie and Zoë Bailey, Wendy and Dave Blom, Jessie Bowen, Ross Donald, Judy Hadrick, Eliot Jekowsky, Bob Jorgenson, Don Leathe, Phyl Lynes, and the entire Lorimier family: Abby, Gwen, Kim, and Sue.

Guest Musicians

In December First Parish former Music Director Vivian Montgomery and her Klezmer band played traditional Jewish music during worship, which with its at times dace-like and at times reflective quality brought colorful contrast to our usual music. First Parish member Bob Jorgensen and his saxophone quartet brought another unique flavor to worship with their performance of arrangements of several classical masterpieces. The drum circle led the congregation into a meditative music making, and Unitarian poet and musician Jim Scott led a musical service in which he taught us a number of his songs.
ADMINISTRATOR’S REPORT
by Susanna Whitman

This has been my third year at First Parish in a year when First Parish is repaying Temple Beth Shalom for the hospitality we received when renovating our building nearly ten years ago, as the Temple renovates theirs this year. They are also using other congregations’ spaces. The Temple will likely be ready by September 2016. They are holding classes through this Summer at First Parish.

The volume in my already considerable workload increased noticeably, while my work life has also been enriched by getting to know Temple staff and working with them. Not only was the office more hectic with a second congregation using our space, but I was called upon to do work that is normally handled by volunteers at First Parish, namely event coordination. This is extremely time-consuming work.

This year the Temple held several worship services in our sanctuary, including regular Friday Shabbat services, special holiday services such as for Passover, and Bar and Bat Mitzvah services. In addition, Temple members rented space for memorial and Bar and Bat Mitzvah receptions.

The timing of hiring Michael Caramanica as Sexton just before the Temple was to use our facilities could not have been better. Without him this year, I would have continually needed to find volunteers to fulfill the many needs of the Temple, year long. Michael rose to the occasion and welcomed our guests. The Temple also compensated him when his work was for them, as he works for First Parish 8 hours a week.

New Staff This year saw the introduction of four new staff members, in order of their start dates: Freddy Soto, Cleaner; Michael Caramanica, Sexton; Jennifer (Jen) Duhamel, Religious Exploration Assistant; and Sophie Hadingham, Youth Programs Coordinator. As the staff member responsible for Human Resources I saw to their payroll, on-boarding, orientation and other welcoming processes.

Sexton and Cleaner Many thanks to Mary Ann Oldfield and Eleanor Rosellini who supervised the Summer cleaning program. They were key in developing job descriptions, hiring, then supervising the use of materials and the projects. Our new cleaning and repairs staff mean that I no longer have to coordinate volunteers to take care of this work. Freddy Soto, Cleaner, cleans three times a week, and Michael Caramanica, Sexton, cleans three times a week and also does building repairs.

In Summer 2015 Freddy undertook some deep cleaning projects generally upgrading the cleanliness of the church building. The results were noticeable and sparkled. Michael painted the corridor walls and repaired portions of the sanctuary floor.

During Summer services—held in air conditioned Parish Hall—Michael sets up the room. During the rest of the year Michael is on hand to clean up after social hour in Parish Hall, but not set-up. If his position were to increase in hours he would be able to both set-up an clean-up on Sunday. This would be possible with an increase in pledge income.

My regular workload during the church year 2015 – 2016 encompasses:

- **Financial work** and bookkeeping, including
  - accounts payable (invoices, reimbursements),
  - accounts receivable (mostly rentals),
  - entry,
  - pledge mailings,
  - prepping weekly income (Sunday services and mail received) deposit for volunteers.

- **Stewardship** including supporting the auction and annual stewardship drives
• **Updating Realm**, including new members and those wishing to receive the *Bellman and Bell Notes*, as well as pledge entries.
• **Providing training on Realm** to members and friends
• Support committees with **financial reporting**, scheduling, publicity for events & Realm use
• **Calendar**, scheduling, building space use, and private and outside group rentals
• Co-Produced **Emergency Closure** procedures document
• Overseer **annual certification** with the Unitarian Universalist association (UUA)
• Working with Don Leathe to review and update our **procedures and policy documents**.
• Conducting a **salary audit for our insurance renewal**
• Producing this **Annual Report**
• Production of the **weekly order of service and announcements** insert
• **Tracking weekly attendance**
• New to this position, this year, **staff supervision** of the new positions of Sexton and Cleaner
• **On-boarding four new members of staff**, as I am the HR staff designee
• Coordinating, liaising with, and supporting **volunteers** who:
  - Collate the weekly orders of service - Kathi Cotte & Gail Lehman,
  - Annual certify our data with the UUA - Don Leathe,
  - Update our member list with the UUA - Don Leathe,
  - Support A/V needs for programs and events,
  - Provide computer support - Phil Lynes,
  - Enter income in Realm and make the weekly bank deposits - Bette Vogel & Amy Brown,
  - Collate pledge and warrant mailings, Katie Edwards, Gail Hedges, & Kathi Cotte,
  - Collect Generic Ministry donations,
  - **Produce Bell Notes & Bellman** - David Mecsas, Marianne McGowan, & Emily Weiland,
  - Update our website - David Mecsas, Marianne McGowan, & Emily Weiland,
  - Treasurer – Erik Bailey
  - Human Resources (HR) Committee – Bruce Barnett
  - Stewardship Committee – Dave Mackey, Katie Barnett, Darren Zinner, Nancy Wilde
  - Finance Committee – Erik Bailey,
  - Trustees – Nancy Simpson-Banker, Dick Eastman, & Phil Murray,
  - Liaising with all committees.
• Ensuring various **appliances are inspected** in a timely manner, including elevator, chair lift, fire extinguishers, and boiler (for heat).
• **Maintaining church records**: financial, legal, equipment, member status, rites of passage, etc.
• **Ordering supplies**.

Additionally, this year my work entailed:
• Member of **search committee** to hire Sexton and Cleaner. Vetting applications. Interviewing.
• Researching alternatives for **bookkeeping**: a service or a contractor for 3 hours per week.
• Developing a new **wedding package**, reviewed by First Parish rental board (comprised of Treasurer, Finance Committee member, and a Property Committee member), for non-member rentals for weddings.
• Recruiting wedding coordinators to handle these rentals who will be paid by families and couples.
• **Insurance Claim**: for costly damage to wires and a period of heat malfunction due to mice chewing wires.
• In 2016, we were assessed a fine of $\frac{1}{4}$ the original amount assessed in 2013 for our **elevator fine**.
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 their historic past. Another of our priorities is to help the staff and committees answer questions about past events. The present committee was organized in 1998. We meet twice a month on Tuesdays mornings in the Youth Room.

June, 2015—Three third grade classes from the Eliot School visited First Parish. Students were divided into groups to view artifacts, documents and pictures.

September, 2015—First Parish sponsored the annual Needham Historical Society Walking Tour. Committee members opened the church for interested visitors.

October, 2015—First Parish loaned the Mary Sugars Townsend silver porringer and spoon to the Needham Historical Society for their exhibit, ONE HUNDRED THINGS IN 100 YEARS, celebrating the 100th anniversary of the Needham Historical Society.

November, 2015—An historical tour of First Parish was sponsored by the Archives Committee for residents of Seabeds Way.

March/April, 2016—On six Sundays during coffee hour, the Archives Committee showed the Channel 9, Needham Cable HOUSE STORIES, tapes.

September, 2015 to June, 2016—In addition to ongoing storage of past and present documents and activities, the Archives Committee has worked on filling the gaps in the Memorial Book, Orders of Service and the Bellman. Also, we continue the entry of documents and audio visual materials into a computer file. In addition, the Committee responds to questions from outside individuals about former members, some as early as 1740.

COMMUNICATIONS COMMITTEE

Committee Chair: David Mecsas
Contributers: Emily Weiland, Marianne McGowan, Kim Lorimier, Dave Moore, Susanna Whitman

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

Summary of Goals and Accomplishments:

Goals listed in last year's annual report.
- **Goal:** Respond to any communications issues arising out of the current strategic planning process.  
  **Progress:** Communications was not made aware of any major issues that required our attention.

- **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:** No 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 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. Marianne McGowan joined the team taking over alternating weeks of Bell Notes production from David Mecsas and doing a great job. Emily Weiland continued to do the other half of the Bell Notes and to do weekly updates of www.uuneedham.org; however, Emily will be leaving First Parish soon. She will be missed.

- **Goal:** Continue to improve uuneedham.org  
  **Progress:** Fortunately the new website has not required any major work. Unfortunately, Kim Lorimier who was a driving force behind development of the current website and a reliable source of troubleshooting help is leaving First Parish. She will be missed.

- **Goal:** Continue to focus on social media by:  
  - Continuing to improve our Facebook presence  
  - Developing a more robust blog, with multiple contributors  
  **Progress:**  
  - **Facebook:** We're doing OK here, thanks largely to posts by Rev. Catie and others that supplement blog-driven posts.  
  - **Twitter:** We continue to tweet selected items from the website. In addition, Liz Rover Bailey tweets relevant items on a regular basis.  
  - **First Parish blog:** Although we did not follow through well with a formal schedule of posting, we have had 41 posts in the last 9 months, meeting the goal we set of a post/week. Rev. Catie has been contributing monthly; in addition, 16 individuals wrote one or more posts.

- **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 Marianne McGowan has since taken on this duty.

- **Goal:** Continue to work with other committees to optimize First Parish's use of the Realm database.  
  **Progress:** Little activity.
• **Goal:** Develop an online repository for our photo library  
  **Progress:** A Flickr account has been set up, but there's a lot of work to be done populating it.

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

• **Goal:** Organize a ½-day communications retreat to evaluate content and media (including the conversation about the form, frequency and timing of *The Bellman*), possibly restructure current work flows, address concerns that have been raised in various committees, and integrate Rev. Catie's vision for parish communications, possibly using a consultant.

• **Goal:** Produce a high-quality "Welcome to First Parish" video for the website.

• **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, including posting of sermon PDFs.

• **Goal:** Continue to focus on social media by:  
  - Continuing to improve our Facebook presence, specifically by maintaining a current listing of events on Facebook.  
  - Continue developing a more robust blog, with multiple contributors, with a focus on committee contributions.

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

• **Goal:** Explore wider spread adoption of Inventoried File Management.

• **Goal:** Investigate online document-sharing solutions for First Parish.

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**FRIENDS OF SOCIAL HOUR**

**Committee Chairs:** Eleanor Rosellini and Muriel Gehman  
**Committee Members:** Buffy Duhig, Muriel Gehman, Mair Lustig, Eleanor Rosellini

**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:**

• **Goal #1 set at beginning of year:** 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.
We recruited hosts for 41 Sundays (6 hosts each Sunday -- 240 slots to fill). There were 6 open sign-up Sundays (down from 9 the year before). We were able to fill the slots without asking the Small Groups or Neighborhood groups to host more than once. Twelve committees hosted, often twice. Four Small Groups hosted once, and each Neighborhood Group hosted (usually once). The adult choir, youth choir, Youth Group, Parenting Your Children, and Homegrown Coffeehouse also hosted.

- **Goal #2 set at beginning of year**: 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.
  - By June, 2015, most of the slots for the 2015-2016 church year were filled. The schedule can be approximately replicated next year.

- **Goal #3 set at beginning of year**: Recruit new members for FOSH and Kitchen Crew.
  - We still need another Kitchen Crew member. A new Social Hour coordinator is being recruited, since Eleanor is stepping down from that role.

- **Goal #4**: See if some duties, such as sending weekly reminders to Social Hour hosts, can be done by staff rather than FOSH volunteers.
  - Due to staff work load, the Social Hour coordinator will continue to send weekly reminders.

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

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

- **Goal**: Replicate this year's schedule for next year as much as possible. Have most 2016-17 slots filled by June, 2016.

- **Goal**: Try having a "light" beverages only Social Hour on quiet Sundays, such as the Sunday after Thanksgiving, Memorial Day, etc.

- **Goal**: See if RE can help recruit a few parents for open sign-up Sundays.

- **Goal**: Recruit at least one more Kitchen Crew member.

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

- **Other accomplishments**
  - The complexity of hosting Social Hour has been somewhat lessened by including a few of the clean-up duties as the sexton's responsibility and by having the greeters put out the bulletin boards in Parish Hall.
Muriel Gehman has kept kitchen supplies stocked and has procured church-supplied juice, children's snacks, and coffee cakes.

GREEN CONGREGATION

Committee Chairs: Katrina Kipp and Eleanor Rosellini

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

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

Summary of Goals and Accomplishments:

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

Worship:

- Order of service text (on back page) mentions "engagement with environmental and social justice initiatives’ and the script for the Sunday Welcome now includes: "We are a Green Sanctuary committed to care for the Earth and to work for eco-justice as we address the climate crisis.”
- Environmental themes are included at least once a month in prayers, readings, story for all ages, or mentioned in the sermon.
- Reverend Catie has given several strong sermons with environmental themes, including a 3-part series on the Commit2Respond initiative.
- April 17 was the Earth Day Service, remembering the work of Unitarian Universalist scientist Clyde Tombaugh, Maria Mitchell, and other astronomers who looked to the stars to understand more deeply humanity’s place in the wider universe.
- Elise Coughlin organized a 2015 summer service about food issues, with a potluck afterwards.

Education:

- October 4: Katrina Kipp and Eleanor Rosellini gave a Needham Lyceum presentation on “Checking in on Climate Change: Current Research, Legislation, and International Action.”
- October 25: The committee invited activist Fran Ludwig to give a Needham Lyceum on the Pope's Encyclical: "Laudato Si’ -- Summary and Reflections on the Pope's Encyclical.”
- GCC created many educational materials about Commit2Respond, including information sheets, Q&A session, information table at Social Hour.
- November 29: GCC organized an interfaith vigil at First Parish to send a message to world leaders asking them to take bold action during the Paris climate talks set to begin the next day.
- April 10: Showed the food waste documentary "Just Eat It" at First Parish, cosponsored with Green Needham Collaborative.
- Several GCC members hosted home showings of the climate action film "This Changes Everything."
Sustainability:
- From March 2015 - March, 2016, our solar panels produced 16,995 kilowatt hours of electricity. Since the panels were installed in March of 2013, they have produced 48,193 kWh, avoiding 64,627 pounds of CO2 and saving the church several thousand dollars on its electric bills.
- In February GCC initiated a new "Commit2Respond Action of the Week," which included, among other actions, providing information on recycling, having people make calls to their legislators about supporting solar energy, and signing a petition to Gov. Baker about supporting offshore wind.
- 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 22. Once again, the 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 participated in lobbying activities for the energy bills being considered by the State Legislature.
- Through efforts by the property committee, First Parish had a lighting retrofit to LED lighting. Almost half the cost was paid for by Eversource.
- Committee is planning a June 12, 2016 "Sustainable Living" open house featuring homes of FP members.

Environmental Justice:
- October 12: 6 First Parish members participated in the State House Lobby Day organized by the MA Interfaith Coalition for Climate Change (MAICCA).
- Dec. 12: Seven FP members took part in the Jobs, Justice, Climate March in Boston.
- During Spirit of Earth Month, GCC led a food justice activity with the RE classes to demonstrate the difficulty encountered by low income people trying to get healthy, fresh food. This was followed up by a collection of fresh food to donate to the Needham Food Pantry.
- 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. Three plate collections during the month of April were split with the Farm and the annual farm work day was on April 24.
- Contact with the Needham Housing Authority to see how we can help with weatherization resulted in the Authority applying for a special program to get energy audits for NHA residents of single family houses.
- Two GCC members became active in MAICCA and organized meetings with Rep. Denise Garlick and Sen. Mike Rush about energy issues.

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.
- Still to do: reminder signs to turn off lights, and publicize access to the website which monitors our solar output (include on FP home page); add Commit2Respond page to website.
Goal #4: Encourage all church committees to integrate concern for the environment in their regular committee activities. We continue to work with the Worship Committee (Roll and Stroll), Continuing Ed, Property Committee and especially Social Action (environmental justice).

Goal #5: During the church year we will sponsor at least 4 Green Sanctuary events with broad intergenerational appeal.
- This year: Roll and Stroll Sunday on May 22, April 24 Needham Community Farm work day.

Other accomplishments:
- The major accomplishment was getting a unanimous congregational vote on Commit2Respond on Nov. 8, 2015. Endorsing Commit2Respond means 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.

Looking ahead — preliminary goals and issues for next year
- Goals will be similar to last year's, with the addition of mounting another Green Energy campaign in the fall.

Issues:
- For our events we would like more participation by young families, and we could always use more members (especially younger members) who can commit time and energy.
- 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. Continuing Ed. organizes some of the environmental presentations. Social Action is an important partner in environmental justice work. This is the goal of Green Sanctuary — that First Parish’s “green” work is done in many ways and through many committees.

THE HOMEGROWN COFFEEHOUSE

Committee Chairs: Jim and Beth Sargent

Committee Members: No standing members. This 33 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 on sabbatical this year, and has over 25 years of volunteer service. Tom & Muriel Gehman, Jim Long, Gray and Eli Brown, Paul and Leo Rooney, Dee Galacki, and Jesse Bowen have been regular contributors this year, and many others have helped out.

Mission Statement: The Homegrown Coffeehouse was launched as a First Parish volunteer activity in 1983, with a mission to bring to Needham a wide variety of the then “folk revival” performers that were just beginning to surge locally and nationally. We 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. When possible, invite artists to stay over for a Sunday morning service. Having the First Parish Singers perform with Joe Crookston was highlight this season. **Done.**

• **Goal # 3**: Raise at least $7,500 for the FP general fund. This was the second year of 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.

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

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

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

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**THE LAURIE ANN GERBER MEMORIAL FUND**

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

**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 1, 2016

**Accomplishments:**

- A $1,000.00 was contributed to the Senior Youth Group’s trip to New Orleans in memory of Laurie who was a very active member of the Youth Group.
- Continue to loan books and DVDs as people request them.

**Looking Ahead**: Continue our goal of helping to educate people about the relationship between food and health. The next Pot Luck Vegetarian Dinner will beheld Wednesday, June 1, 2016. A DVD by Dr. David Pearlmuter called “Brain Maker” will be shown This will deal with nutrition and its effect on the brain and chronic diseases.

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

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**MEMBERSHIP COMMITTEE**

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

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

Summary of Goals and Accomplishments:

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

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

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

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

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

Looking ahead — preliminary goals and issues for next year

1. We will continue to refine our reach-out to potential members, to provide them with information and to help them get connected to the First Parish Community
2. We will explore ways to reach out to underserved populations in Needham, eg Olin College students
3. We will continue to think about ways to reach out to parents whose children have aged out of the RE program and perhaps left home so that they will continue to be involved at First Parish.
4. We will work with Parish Committee on goals specifically related to growth.
Issues:
1. We are concerned about First Parish’s outreach to the community, both in terms of letting the community know about First Parish and also about inviting diverse people to become part of the community. There are many programs and opportunities at First Parish that would appeal to individuals and families in the Needham community if they knew about them.
2. We are concerned about retaining members whose children and teenagers are no longer active at First Parish.
3. We will request a meeting with members of the church staff and Parish Committee officers to discuss how Membership Committee can support the growth goal of the Five-Year Plan.

MEMORIAL FUND AND GARDEN COMMITTEE

Committee Chairs: Elizabeth Duhig and Kay Taylor
Committee Members: Dick Eastman, Tom Gehman, Lyn Jekowsky, Gail Lehman, Mair Lustig, MaryLou 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 sixth Memorial Window in the near future.

Accomplishments:
- Continued to maintain and add to gardens around the church and Wayside Pulpit.
- Continued to manage Memorial Gifts received this year,
- 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 replace and replenish perennials as needed throughout the gardens

COMMITTEE ON MINISTRY

Committee Chair: Amy Cicala
Committee Members: Tim Brennan, Nate Harrington, Helen Lane, Laura Perez and Tad Staley

The Committee on Ministry was started two years ago with two main goals—(1) to support our new minister and (2) the success and growth of the ministry of the congregation. This is a departure from the previous Ministerial Relations Committee, a change recommended by the UUA. Our committee meets monthly to discuss both the positive experiences of members of the congregation as well as any issues of which we are aware.

One of our recent efforts has been to support the efforts of the finance committee during the pledge drive to provide equitable salaries for our employees. Another major responsibility during the first three years of Rev. Catie's ministry is her evaluation that is submitted to the UUA and is a part of her accreditation. Members meet with many of the standing committees in the spring to solicit feedback on the overall
health of the congregation and Rev. Catie’s ministry. We also encourage members to share feedback at any time.

MUSIC COMMITTEE

Committee Chair: Becky Siebens (former co-chair Emily Weiland stepped off in March due to family move)

Committee Members: Carol Alper, Jessie Bowen, Betty Byers, Ross Donald, Cynde Hartman, Jim Sargent, John Smith. Staff: Irina Georgieva, Music Director; Kate Loftus Campe, Assistant Music Director for Youth and Intergenerational Programs.

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

Summary of Goals and Accomplishments:

- **Goal 1: Care for musical instruments owned by the church.** Progress: PIANOS: Replaced aging grand pianos in sanctuary and Parish Hall. (The 1890s sanctuary Knabe grand piano, owned since the 1940s by the church, was sold and replaced with a 20-year-old 7.5’ Samick concert grand, reportedly made for the Rhode Island Philharmonic, donated by the Boni family. The Mason & Hamlin in the Parish Hall was replaced by a 6’ Kohler & Campbell purchased from the Lorimier family. The Mason & Hamlin was moved to the choir room for a major improvement in choral rehearsals.

  ORGAN: Organ installer returned to evaluate our instrument and determined it to be in fine condition for a period instrument of its kind. We now have contacts for the minor adjustments/repairs to be expected and have earmarked funds for regular maintenance.

- **Goal 2: Continue building the music program at the church with diverse music and involvement by many.** Progress: Staff have continued to build connections with musicians in the congregation and to engage and develop the full range of our musical groups, from SongSquad (17 children), UURingers (11 youth), to adult choir (~18 members) to First Parish Singers (~15 members). The wide range of music heard during our services is covered in the music staff’s annual report. Assessment and repair of the organ this year has made possible the regular inclusion of organ music in services as another element of our diverse program.

- **Goal 3: Engage the congregation in music in fresh ways.** Progress: Experiments have been under way in offering “gathering music” before the worship service starts, and having song leaders to invite increased participation and clarity for group singing. Outside of worship services, the Committee hosted a third Holiday Sing-Along in December, led by Kate Campe and Jim Sargent.

- **Goal 4: Build adult choir by hiring professional singer(s).** Progress: Irina hired 3 paid singers to join the choir on scheduled Sundays. They supplement the adult choir, make it possible to sing a broader repertoire of music (especially 4-part music) and may help attract more singers over time.

Looking ahead — preliminary goals and issues for next year
- **Goal**: Now that a successful transition is complete from First Parish’s previous long-time Music Director, through an two-year interim period, to our new Music Director: review and refresh the Committee’s mission, vision, representation, and communication mechanisms, looking ahead to the future yet building on the past.

- **Goal**: Continue building participation in musical programs, and determine the extent to which the Music Committee will lead music-related activities outside worship services to build community. (The part-time schedules of staff limit their ability to participate in activities not directly related to worship services.)

- **Goal**: Improve the physical set-up for singing in the church by purchasing choir risers and ensuring good sight lines for musicians, to the extent financially feasible. Build our instrument collection to the extent possible.

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**NOMINATING COMMITTEE**

**Committee Chair**: Anna Berkenblit

**Committee Members**: Liz Rover Bailey; 3rd member stepped down

**Mission Statement**: The mission of the Committee is to develop a slate of officers for 2016 – 2017.

**Summary of Goals and Accomplishments**:

- The two outgoing members of Parish Committee, Jen Robins and Mary Ellen Menken, along with First Parish President Gail Hedges, Vice President Don Leathe and Reverend Catie Scudera joined us in the winter months to develop a slate of officers for the 2016-17 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 2016 Annual Meeting. [See the Warrant, p.5 for the complete slate of candidates]

- Additional nominations may be made in accordance with the Church By Laws (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 office, the Church By-laws 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.”

- Re-established the Finance Committee, attempted to identify individuals to serve in capacities including chair of social hour, members of the caring crew, continuing education, and public relations for First Parish.

**Looking ahead — preliminary goals and issues for next year**
Goal: To continue working with Rev. Catie to expand the committee’s remit to include positions outside the formal slate process.

PASTORAL CARE TEAM

Committee Chair: Janet Klein

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

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

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:** Presented year-long theme on End of Life Issues for the community, in cooperation with Adult Ed: QPR Suicide Prevention Training with Jon Mattleman of the Needham Youth Commission; Two sessions on The Conversation Project, introduction by Rev. Rosemary Lloyd; Book Discussion of “Being Mortal” by Atul Gawande; Two sessions on Five Wishes including presentation and discussion with Dr. Eliot Jekowsky and Dr. David Blom.

- **Goal #2:** Worked toward a Pastoral Care Lending Library with donated books on loss and grief. Entered those titles into The Library Thing, First Parish’s online book catalogue. In process of organizing books on the Parlor bookshelves, incorporating new and present holdings, updating church website to make library more accessible, and devising a borrowing system.

- **Other accomplishments**
  - In-service Team Retreat in February: balancing caring for ourselves with meeting the needs of our Beloved Community.
  - Rev. Catie, in concert with the Wellesley Hills congregation, restarted monthly worship services at North Hill.
  - The Support Group for Caregivers continued meeting twice monthly, led by our member Lyn Jekowsky, a nurse with significant experience.
  - Sent sympathy cards before the December holidays to those who had lost a loved one in the past year, and also at the one year anniversary of the loved one’s death.
  - Facilitated First Parish living our covenant as “a loving community” by recording our Sunday service’s Candles of Joy and Concern and sharing highlights in the Bell Notes and Bellman.
  - Wrote a blog to explain the differences among our three affiliated groups: Caring Crew, the Support Group for Caregivers, and Pastoral Care Team.
  - Hosted two Social Hours

Looking ahead — preliminary goals and issues for next year
Goal: Explore presenting a year-long theme on Mental Health issues, tentatively including sessions on depression, postpartum depression, dementia, drug and alcohol addiction/abuse, and a forum on the ballot question to legalize marijuana. Possible screening of the film, “Still Alice.”

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

Goal: Continue offering opportunities for discussion on end-of-life issues, if there is interest.

Issues: Caring for ourselves as we care for others continues to be an ongoing focus of our team. We are considering adding another in-service retreat before our ingathering Sunday in the Autumn, to explore ways to support each other by sharing duties, make monthly meetings optimally useful for all participants, and share wisdom as we build our team and work toward our goals.

PROGRAM COUNCIL

Committee Chair: Don Leathe, as Vice President of Parish Committee

Members: All chair(s) of each committee are members, including:
Jeanette Anderson (Archives), Buffy Duhig (Caring Crew, Memorials and Special Gifts), David Mecsas (Communications), Phil Lynes (Continuing Education), Tracy Abbott (DRE Relations), 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 (Music), Katie Edwards (PYC), Janet Klein (Pastoral Care), Paul Rooney (Property), Jen Packard (RE), Helen Lane (Small Group Facilitators), Scott Muldoon & Clark Taylor (Social Action), Liz Rover Bailey (Welcoming), Scott McCue (Worship), Kristen Neff (YAC), Amy Cicala (Committee on Ministry) Muriel Gehman & Eleanor Rosellini (Friends of Social Hour), Nominating (Anna Berkenblit), Gail Hedges (Parish Committee), David Mackey (Stewardship)

Mission Statement: The mission of the Program Council is to help committee chairs coordinate their activities and programs in support of the Church’s mission statement & vision and to serve as a forum to discuss issues and problems, inform each other and the Parish Committee on their activities and to look for support where appropriate. Additionally, the Council serves as a forum where programs can organically be identified and developed.

Summary of Goals and Accomplishments:

Goal #1 Serve as an important cross-committee communication vehicle

- We met ~every other month and ensured that all attending committees discussed their activities and facilitated a discussion of cross-committee questions, answers, clarifications and surfaced opportunities for cross-committee cooperation/joint programming.

Goal #2 Serve as an important forum for identifying key committee issues and aiding in their resolution

- A key part of each session was the surfacing, discussion and working of key issues needing assistance in their resolution which we did via identifying who would work issue and following up to ensure resolution.

Goal #3 Publicize opportunities for involvement, committees needing increased volunteers @ First Parish
We used multiple communication vehicles to accomplish this; My Turn on Sunday, multiple notices in the Sunday Service program, Bellman notices and through the Gathering of the Flock and Nominating Committee. All except the Nominating had miserable response (zero).

- **Goal #4 Investigate & encourage opportunities for cross-committee program development**

The meetings continued to be a platform for potentially surfacing cross-committee program development however this effort met with very limited success.

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

- **Goal #1**: Continue to serve as a vital cross-committee communication forum as well as one that aids in surfacing and resolving of key committee issues.

- **Goal #2**: Increase the value of this group by making it more entrepreneurial so that it serves as a more vibrant forum for cross-committee program and event idea generation, development and implementation.

**PROPERTY COMMITTEE**

*Committee Chair:* Paul Rooney

*Committee Members:* Ed Quinlan, Carl Franceschi, David Mecsas, Mary Ann Oldfield, Karl Heinz, Christy Cocchi, Jeff Heller, Phil Pierce, Michael Caramanica (ex officio), Susanna Whitman (ex officio)

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

*Summary of Goals and Accomplishments:*

- **Goal #1 set at beginning of year:** Support the Parish Committee to hire a sexton and cleaner to improve the maintenance of First Parish. First Parish hired Michael Caramanica as a sexton and Freddy Soto as a cleaner. Both have been great additions to First Parish. The overall cleanliness has been much better, minor repairs and maintenance are addressed more quickly, clean-up following social hour is easier, and the members of the Property Committee are not required to do as much routine maintenance.

- **Goal #2 set at beginning of year:** Replace all the lighting in First Parish with energy efficient LED lights. Ed Quinlan coordinated the conversion and covering a portion of the cost through energy efficiency rebates. The result has been good lighting at First Parish and a significant reduction in electricity usage.

- **Other accomplishments**
  - Installed motion sensor lights in the Memorial Garden and in the back of the driveway by the HVAC units to improve security.
  - We have a new Chair of the Committee, Paul Rooney.

Worked with the HVAC contractor to diagnose a fault in the heating control system. Mice damaged some of the wiring in the vestibule walls which resulted in problems with system operations. First Parish has filed an insurance claim to attempt to recover costs.

**Looking ahead — preliminary goals and issues for next year**
• **Goal**: Develop / update procedures for rental facilitators and event coordinators to help ensure First Parish is clean and restocked for the next day.

• **Goal**: Work to stay within our annual maintenance and repairs budget. Expenses have been exceeding the budget over the past couple of years and we continue to have some deferred maintenance items due to budget constraints.

**Issues**: Significant repairs are needed on the Youth Room and Nursery floors and the carpet and flooring in the Sanctuary will need to be replaced.

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**RACIAL JUSTICE TASK FORCE**

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

**Task Force Members**: Catie Scudera, Carol Barnes, Joan Benzie, Wendy Blom, Amy Cicala, Kathi Cotte, Jack Davis, Ross Donald, Muriel Gehman, Sophie Hadingham (ex officio), Molly Kerrigan, Dave Knapton, Fred Kresse, Don Leathe, Jim Leffingwell, Carolyn Lynes, Susan McGarvey, Joan Mecsas, Fay Remnitz, Clark Taylor, Jonathan Tholl, Pat Tholl

**Mission Statement**

The mission of the Racial Justice Task Force is to live the UU values of justice, respect, and equality by:

- deepening our understanding of systemic racism in our culture;
- growing in our self-awareness of our own roles in a racist culture;
- developing our ability to live authentically in a multi-cultural world;
- and taking action toward creating a church, community, society, and culture that are no longer based on racism.

**Summary of goals and accomplishments**

• **Goal #1**: Offer multiple formats for learning about racism in our society, both to the Task Force and to the congregation. Progress toward that goal: Offered several multi-session book groups on *Waking Up White* by Debby Irving; participated in several learning/networking events at the UU Urban Ministry; offered a video and discussion group about Michelle Alexander’s book *The New Jim Crow*; sponsored the church’s book of the year, Ta-Nehisi Coates’ *Between the World and Me* with a discussion group and a Lyceum; sponsored a Lyceum on Jesse Owens; sending a pilot delegation to Mothers’ Day Walk for Peace in Boston.

• **Goal #2**: Take specific actions to move toward a more just community in Greater Boston. Progress toward that goal: In collaboration with Social Action Committee and as an expression of our Commit2Respond pledge, began exploring a partner relationship with ACE (Alternatives for Community and Environment) by participating in their “toxic tours” of Roxbury and volunteering at their annual meeting and at two community gardens.

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

• **Goal**: Become more publicly visible in representing FPN’s commitment to racial justice by providing relevant quotations for use in the Wayside Pulpit; conducting a thoughtful church-wide discussion and decision-making process about putting up a Black Lives Matter sign, using this as an opportunity for dialogue.

• **Goal**: Participate in creating a banner for use in marches and demonstrations, in concert with other FPN social/environmental action groups.

• **Goal**: Seek opportunities to contribute to public dialogue by writing letters to the editor, blogging, and the like.

• **Goal**: Conduct a visioning session to engage the entire Task Force in thinking through how the group can be most effective in taking action in this community.
Goal: Clarify Racial Justice Task Force’s position within the church administrative structure, including budget.

 Goal: Continue with Learning goal.

 Goal: Continue with Taking Action / Showing Up goal: Continue building our partnership with ACE.

 Goal: Connect with the Youth Group around learning about and taking action against racism.

 Goal: Engage all members of the Task Force in ways that make sense for them, from those who are actively involved to those who are interested but unable to be more active; reaching all ages.

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**RELIGIOUS EXPLORATION**

**Committee Chairs:** Laura Long and Jen Packard

**Committee Members:** Dana Robinson, Jodi Rooney, Tracy Zendzian, Mark LaPointe, DLRE (ex-officio)

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

**Summary of Goals and Accomplishments:**

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

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

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

- During the 2015-16 year we faced some gaps in recruiting adequate volunteers, resulting in merging the K-1 and 3-4 classes. Although this approach met the essential needs it highlighted the importance of securing commitments from both new and older members with children in the program. Participation from all families is necessary for the program to run efficiently as a coop.
- Two new male teachers for OWL joined the teaching cohort.
- Support for hiring an assistant for the RE Director. Jen Duhmel assumed this role in the fall and has been an important addition in program support
- Support for hiring a new advisor for the youth program, both the Youth Group and Junior Youth Group. Sophie Hadingham assumed this role in the late fall and continues to become integrated with the youth and families.

**Goal #2** Review and revision of the RE curriculum to reflect the evolving needs of our youth and congregation.
During the 2015-16 church year the DRE and committee explored a play based curriculum called “Spirit Play” that may be appropriate for our younger children. Further evaluation and possible adoption/integration into our program continue.

Expansion of the RE curriculum for the 2016-17 church year

- Proposed trajectory for 5th grade: Toolbox of Faith
  - 6th grade – NEW CURRICULUM
  - 7th grade – Neighboring Faiths
  - 8th grade – OWL
  - 9th grade – COA

Benefits of the revised structure include
- Neighboring Faiths at 7th grade for slightly more mature youth
- OWL in 8th grade presented over a full academic year
- Full year COA (now runs over just a half year and is felt to be inadequate)

Challenges of the revised structure include
- Need for a new 6th grade curriculum
- Additional teacher cohort needed
- 9th graders will remain in RE another year (rather than in bed).

Other accomplishments
- Events – Organized and facilitated family karaoke night as a potluck integrating PYC and RE families with kids through Junior Youth Group age;
- Social Action – Continued informal expectations that most grades participate in some social action project during the year;
- Outreach – Collaborated with YAC regarding program planning;
- Safe Congregations Task Force – Participation is ongoing;
- Teacher Experience – Annual orientation breakfast and at the half way point introduced having an evening “soiree” to encourage collaboration among grade level teachers and throughout the program. That event had diminished attendance due to a winter storm but feedback was positive and we’ll try it again. Teacher recognition will be integrated in one of the services toward the end of the year.

Looking ahead — preliminary goals and issues for next year

- **Goal**: Improve teacher recruitment outreach and strategies to avoid gaps
- **Goal**: Implement the expanded curriculum addressing issues and challenges as noted about
- **Goal**: RE Committee member recruitment. Unfortunately, we were unsuccessful in adding a male parent to our committee this year. We hope to do so next year, in addition to adding two additional members.

**SOCIAL ACTION COMMITTEE**

Committee Chairs: Clark Taylor and Scott Muldoon

Committee Members: Eleanor Rosellini, Becky Siebens, Tony Cicala, Gwen Mecsas, Marianne McGowan, Rick Vincent, Joan Benzie, Peter DiMarzio, Leslie Nelken, Chris Miara, Rev. Catie Scudera

Recent history

For years, the Social Action Committee (SAC) has served mostly as a forum for volunteers in different, primarily charitable, projects, to report on their status and discuss various issues. The volunteers have
been working in their own spheres. While the larger congregation is supportive, its overall sense of identity doesn’t seem to reflect a central commitment to social and environmental justice. (The Social Action Committee is open for discussion here.)

In the congregational survey given as part of our ministerial search two years ago, a majority of members said they wanted the church to reach beyond our walls to work on issues confronting the wider world. In 2015, the Social Action Committee decided to restructure and work toward a balance between charity and issues leading to systemic change. While seeing both of these levels as important, it recognizes the need is to strengthen First Parish’s emphasis on systemic change. See Goal #2 below.

Summary of Goals and Accomplishments:

- **Goal #1 Get approval of the Commit2Respond initiative by the congregation**
  The congregation unanimously voted on November 8, 2015, to join the initiative. C2R is a long-term commitment, with reports due to the UU General Assembly after three years, and SAC will be working to help First Parish meet its goals.

- **Goal #2 Transition the organization from one that primarily facilitates reports on charity programs (direct service to people in need) to develop a strategy that more effectively balances charity and systemic change programs (that address the underlying causes of society’s problems) for social and environmental justice.**
  The Green Congregation Committee and the Racial Justice Task Force have become important participants in the SAC through their representatives, and we have changed our meeting protocols to allow us to achieve a better balance between charity programs and action for systemic change. But it is a work in progress.

- **Goal #3 Begin to develop relationship with the Boston-based agency: Alternatives for Community and Environment (ACE)**
  We started the relationship through having 14 of our members participate in an ACE-sponsored “Toxic Tour,” where we saw programs through which ACE has developed its social and environmental programs. We then met with ACE leaders, volunteered for a fall event, and also helped out at ACE’s annual meeting. We will continue to look for opportunities to build mutual trust and effective action.

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

- **Goal 1. Inventory all social action initiatives associated with First Parish. Document their current status; determine the types of volunteer activities available and the funding and other resource requirements for each.**

- **Goal 2. Create an environment in which all social action participants see themselves as part of one church-wide social and environmental justice effort:**
  a. Change the SAC meeting process from one in which groups report primarily on their activities to one that emphasizes the exploration of strategies through which we can become more faithful and effective in the pursuit of our initiatives.
  b. Engage each group in a dialogue on how its activities are working to meet one or more of the church’s five-year social and environmental justice action goals.
  c. Assess semi-annually the emerging balance between charity and systemic change activities and determine ways in which we can bring them into greater balance.

- **Goal 3. Develop Social Action’s communications capacity so we can:**
a. Regularly publicize the congregation’s social and environmental justice activities—not only group activities, but also the justice-related involvement in individual members' lives.

b. Develop a strategy for permeating the congregation’s thinking with the spiritual dimension of social and environmental justice, as described broadly in Goal #1 of the five-year goals.

c. Stimulate a sense of a joyous and spirited community in the pursuit of its social and environmental justice goals.

d. Create a calendar of social justice volunteer activities for all justice-related programs.

☐ Goal 4. Explore ways in which the church can work with other UU churches and faith communities in pursuit of its initiatives.

Issues:
1. A key issue is the ever-recurring one of manpower/volunteers. We are working to engage new members and are beginning to see some results. But key posts are still held by the usual leaders.
2. Our relationship with ACE, while growing slowly, will be difficult to quantify any meaningful results, at least over the short term.

WORSHIP COMMITTEE

Committee Chair: Scott McCue

Committee Members: Jeanette Anderson, Elinor Brady, Jim Leffingwell, Phyll Lynes, Liz Rover-Bailey, Kim Hokanson

Associated Members: 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:

• Coordinate Worship in the Absence of the Minister The committee has worked hard to ensure worship is coordinated in days that the minister is not in the pulpit. In the 2015-2016 church year, this has included:
  o 9/27: Stephen Shick
  o 10/15: Evan Seitz
  o 11/29: Patricia Hatch
  o 12/27: Joanna Lubkin
  o 1/24: Susan Chorley
  o 3/31; Lisa Ward
  o 4/3: Jim Scott
  o 5/29: Rev Annie Gonzalez-Milike
Committee members and other members of the Congregation served as Worship Associates on these dates.

- **Support Year-Round Worship and Organize Parish Hall (Summer) Services**: Phil Lynes and Tad Staley have generously agreed to serve as Summer Service coordinators once again. To date, we have secured leaders and Worship Associates for the majority of summer services.

- **Support Evaluation of Theme-Based Worship**: The Committee has engaged in ongoing conversation with Rev. Scudera regarding the efficacy of theme-based worship. We are currently examining the most appropriate ways to gather feedback from the congregation regarding the move to theme based worship.

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

- **Evaluation of Theme Based Worship**: We are enthusiastic about working with Rev Scudera and the staff to continue refining our approach to theme-based worship in the coming year.

- **Problem-Solving Holiday Scheduling**: In the coming year, Christmas and New Year’s Eve are on Sundays, with the staff scheduled to be off-duty from 12/25-1/1. We will be working with Rev. Scudera to problem-solve staffing for Christmas, Hanukah, and New Year’s.

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**YOUTH ADULT COMMITTEE (YAC)**

**Committee Chair**: Kristin M. Neff

**Committee Members**: Cassie Bailey, Erin Gilmore, Sophie Hadingham (ex-officio), Christine Harrington, Molly Kerrigan, Mark La Pointe (ex-officio), Gwen Mecsas, Priscilla Mullin, Emma Needham, Zach Packard, Arturo Perez Sr

**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 increase consistent Senior Youth attendance and engagement in the Senior Youth Group, and to increase awareness of the Senior Youth Group with the greater congregation.

   **Accomplishments:** The Youth Group strives to welcome and include anyone who wants to participate. That being said, in YAC we discuss any appropriate aged youth who are not engaged in the Youth Group or who were regular attendees and have dropped out. We discuss ways to reach out to these youth to connect with them, encourage them to give the Youth Group another try, or at a minimum to understand why they no longer participate. If there are actions that can be taken to include more youth, we discuss and implement as appropriate. This is an ongoing activity throughout the year.

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

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

3. **Goal:** To incorporate spiritual activities that are meaningful to the Senior Youth in the Senior Youth Group meetings (for example, the Place of Wholeness curriculum).

   **Accomplishments:** Bringing spiritual activities into the Youth Group meetings continues to evolve. With Sophie joining recently as the new Youth Group leader, and given her personal experience with Unitarian Universalism, she will bring her ideas about how to best incorporate spiritual activities in the Senior Youth Group meetings in a way that is meaningful to them.

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

   **Accomplishments:** The Youth Group went on their annual service trip to New Orleans, and has participated sporadically in other activism and service opportunities. This continues to be an area of growth for the youth, and is especially important for those youth who are not able to attend the annual service trip due to conflicting school schedules.

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

   **Accomplishments:** Some of the youth have embraced this goal and taken on leadership roles at First Parish, including participating on Committees and teaching RE. It will be important to continue to make the youth aware of the different leadership opportunities at First Parish and encourage them to take advantage of these opportunities as they are able.

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

   **Accomplishments:** The communication has been challenging given the lack of a Youth Leader for the first part of the year. Now that Sophie is in place, optimal communication is critical. We have
agreed that all information will be shared via email and via Facebook to ensure all youth and parents are able to access the information. Also, Sophie will communicate the next month of meetings/events to all to ensure everyone knows the schedule and can plan accordingly.

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

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

1. **Goal:** Make Senior Youth Group more inclusive especially to youth who cannot go on the annual service trip.

2. **Goal:** Have at least one Senior Youth Group member take part in weekly Sunday Service (reading, ushering, greeting, etc.).
FINANCE COMMITTEE

Committee Chair: Erik Bailey (Treasurer)

The 2015-2016 church year has continued the progress that we made last year. The 2014-2015 Annual Report noted that “The 2014-2015 church year has been a transition year in many financial aspects,” and that was absolutely true. There have been far fewer transitions this year, and the groundwork has been laid for increased stability and predictability in our church finances. However, the work is not yet complete, and there is still some uncertainty in the numbers.


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

Last year’s report noted: “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.”

Total income from pledges for FY15 was $314,180, including $44,585 in early payments (prior to July 1, 2014) and $8,781 in late payments (after June 30, 2015; some of which was just now received in April, 2016). This is actually 0.1% above our income target of $314,000, and therefore was significantly better than expected! Total income from all sources was $439,128, which was $32,466 (8%) more than budgeted.

Total expenses for FY15 were $419,451, which was $12,789 (3%) over the budget of $406,662.

This means that, overall, FY15 had a $19,677 surplus. While certainly good news, this surplus means that budgeting (especially on the income side) was not as good as it could/should have been. This is certainly being taken into account as future budgets are being constructed. In particular, we are looking to determine the best pledge collection / non-collection percentage to use, as well as ensuring that the financial numbers in QuickBooks are as accurate as possible.

Report on Current Year (FY16: 2015-2016)

The current church year (FY16, representing July 1, 2015 through June 30, 2016) is progressing well from a financial perspective. The information contained here is based on 9.5 months of actual data (July, 2015 through mid-April, 2016), as well as extrapolated projections for the rest of the fiscal year. As was the case last year, final numbers will not be available until September or possibly later.

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

I. New Sexton and Cleaning staff
A. We were thrilled to welcome Michael Caramanica (Sexton) and Freddy Soto (Cleaner) to the First Parish family this year! They have easily proven their value to our church; the facilities have never looked so good! However, this change has had a greater financial impact than expected.

B. The original budget for the cleaning service was $16,100. The budget for the two staff members was set at $18,000. The current trend, based on hours worked, is about $20,000, so this was under-budgeted.

C. An unanticipated expense has been cleaning and repairs materials. This was a significant cost this year, due to the requirements of purchasing completely new materials (both consumables and durables) that were previously provided by the cleaning service. This has caused a projected overrun of the Supplies budget by approximately $2,000, and the Building Maintenance budget by approximately $500. It is expected that the impact will be less in future years.

II. New RE Administrator and Youth Coordinator
A. We were likewise thrilled to welcome Jen Duhamel (RE Administrator) and Sophie Hadingham (Youth Coordinator) to the First Parish Family this year! Similar to the above, this had a financial impact to the budget.

B. Jen’s compensation is above that of the previous (member-filled) RE Admin position, and had it been a full-year hire, would have required a $3,000 increase to the budget (likely from the Contingency). However, since the position was only filled mid-year, the overall expense will be very close to the original budget, so no changes were required.

C. Sophie’s compensation is very similar to the previous position; there is a slight beneficial impact on the budget there, but nothing substantial.

III. Installation of the new LED Lights
A. As was noted last year, $7,214 of the expense of the LED lighting installation (which was exactly as planned at $9,245) was sourced from the Betty May fund. Due to the particularities of the timing, the expense was recorded in FY16, although it was originally intended as a FY15 expense. There is no positive or negative financial impact of this; just a record-keeping note since it spanned fiscal years.

IV. Use of our building by Temple Beth Shalom
A. Temple Beth Shalom were truly gracious hosts to our congregation in the 2007-2008 church year as we did our renovation project, and this year we have been blessed with their presence as they work toward their own major renovation project. This has affected areas of the physical building budget such as electricity, water, and sewer usage.

V. New QuickBooks database
A. Prior to this year, all financial records have been in the QuickBooks file that has been used since FY04 (the 2003-2004 church year). As such, a decade of financial detritus had built up, including obsolete fund categories such as the “Ruddigore” performance.

B. As of July 1, 2015, a brand-new QuickBooks file was created, essentially starting from scratch. This has enabled a clean set of categories, making budgeting and reporting easier. The previous data is, of course, still easily available.

C. This did not have any financial impact, other than the fact that we are not able to produce multi-year reports spanning the FY15-FY16 years without manual work to combine the data. This is an acceptable tradeoff, given the benefits realized.

VI. Reconciliation of Fourth Century Fund contributions
A. The Trustees of the Fourth Century Fund undertook a reconciliation process this year as part of closing out that fund. As part of this, unpaid donations were pursued, and were either paid or written off. In addition, it was determined that $7,700 of contributions intended for the Fourth Century Fund were incorrectly allocated to annual pledges, for FY12, FY13, and FY14. The records were corrected, and this amount will be added to the Fourth Century Fund balance. The net effect of this is to reduce the pledge income for those past fiscal years.

VII. “Split the Plate” for the weekly Collection Plate
A. This is the first year that we have split the Plate Collection 50/50 each week with a social action cause. We had heard anecdotally that this does not detract from the plate as an internal fundraiser (it supports about 3% of our operating budget), because overall contributions increase. This looks to be true! Last year the plate collected $12K with only an occasional split; this year we are projecting $11K for ourselves with a weekly split!

At the time of the writing of this report (late April, 2016), Expenses are tracking to approximately $18,000 under budget. Although the Building is tracking to $13,000 over budget (and would have been higher if we had received more snowfall), most other categories are significantly under budget. The two largest shares of the under-budget expenses are Lifespan Religious Exploration and Office/Governance. The primary driver for LRE is the fact that new staff (Jen, Sophie) did not join until halfway through the fiscal year. The primary driver for Office/Governance is the fact that the $8,000 total for Computer Hardware, Software, and Services was significantly over-budgeted. The former will not be an issue for next year; the latter will be addressed in the upcoming FY17 budget (see below).

As noted last year, it is difficult to forecast Income accurately, as there can be wide swings month-to-month. If pledge receipt ends up at the expected 97% of the $338,000 committed (i.e., at least $328,000 is collected), overall income receipt will be approximately $25,000 more than budgeted. Pledge collection is currently at $240,000, which is 73% of budget ($328,000), and 88% of expected YTD collection ($273,000). The YTD numbers are a concern, since it means we are $33,000 short of where we should be at this point in the fiscal year. Last year we received $34,000 in pledge payments after May 1 (inclusive of late payments). This year, we need $88,000 more to make 97% (budget), or $98,000 to make 100% (commitment).

Assuming a 97% collection rate, there will likely be a surplus of approximately $54,000. However, the 2015-2016 Auction was intended to spread over two fiscal years, so $10,000 of that surplus was anticipated and budgeted for FY16 and will be applied to FY17. As such, the actual net surplus would be $54,000 - $10,000 = $44,000. If pledge collection exceeds or falls below 97%, or if significant church expenses are required in the last few months of the fiscal year, this surplus could increase or decrease; that will not be known fully until the end of 2016. Additional information can be provided to the congregation during the next church year.

Although a projected unanticipated surplus is wonderful, as large an amount as $44,000 means that our budgeting process needs to improve. It will never be perfect – there will be always some years when there is a deficit, and some years when there is a surplus – but the surplus/deficit amounts should be smaller than this. We hope to improve this for FY17.

Report on Next Year (FY17: 2016-2017)

All of the factors described above (and more) have been taken into account when planning the Fiscal Year 2016-2017 (“FY17”) budget. Specifically, the following changes are being made:

I. Increased Income budget
   A. The Collection Plate and Ballet Rental lines have been increased for FY17, based on the past two years’ worth of actual income
   B. Planned Donations (which are not Pledges) are included in the income budget for FY17; had this been done for FY16, we could have planned for $10K+ of additional income
   C. A possibility would be to change the 97% collection rate to something more aggressive (98% or 99%), which would free up more of the pledge commitment for budgeting. It will remain at 97% for now, but will be revisited next year.
II. More realistic Facilities expenses
   A. The staff compensation for the Sexton and Cleaner positions has been adjusted based on current-year actuals
   B. Additional funds have been allocated for supplies
   C. Building budget items have been increased based on actuals from the past two years

III. Staff Compensation (not factoring in compensation adjustments)
   A. The compensation for the RE Admin Support has been increased to reflect Jen’s rate compared to the previous position
   B. The Youth Music Director position (Kate Loftus Campe) has been restored to its full 10 hours per week (from 9 hours this current year)

IV. Staff Compensation Adjustments
   A. We are thrilled to report that compensation adjustments have been made for the First Parish staff (Mark, Susanna, Irina, and Kate). This was a major focus of this year’s pledge drive, and the membership responded generously!
   B. Prior to this year, Susanna was the only one of these four to be paid at or above the UUA’s “Minimum” compensation level for our category of church (Mid-Size II, Geo Index 5). The others were all below the minimum.
   C. The new compensation adjustments move salaries 45% of the way from their current position to the UUA’s “Midpoint” compensation level. This enables everyone to be above the Minimum level (pro-rated).
   D. The new compensation amounts and increases are as follows (UUA minimum also shown, pro-rated based on number of hours worked):
      1. Mark: $45,550 (full time), increase of $6,300. Minimum = $45,350
      2. Susanna: $39,993 (6/7 time), increase of $1,993. Pro-Rated Minimum = $36,171
      3. Irina: $25,015 (1/2 time), increase of $3,015. Pro-Rated Minimum = $24,725
      4. Kate: $10,765 (1/4 time), increase of $765 per year (not including the additional hour noted above, which is worth $1,000). Pro-Rated Minimum = $10,100
   E. For reference, the UUA’s Salary Recommendations for 2016-2017 are available at:
      http://www.uua.org/careers/compensation/fair/congregational-staff (Geo Index 5)

V. Increased compensation for Childcare
   A. The childcare rates that we pay our teens (e.g., for Sunday morning nursery care, or evening events) has not risen in some time. The rate will increase from $10 to $12 per hour as of FY17.

VI. Capital Purchases
   A. Computer Hardware, Software, and Services has been decreased significantly, and part of the allocation transferred to a new Capital Purchases category (see below)

VII. Bookkeeper
   A. It has become apparent to all that the job of Parish Administrator is larger than can be done by one person (Susanna). There is a need for part-time (2-4 hours per week) financial bookkeeping, and this is funded in the FY17 budget, partly through the reduction in the Computer categories noted above.

Capital Purchases

One of the challenges of an operating budget is factoring in non-recurring expenses (usually capital purchases). For example, computers may be on a four-year replacement cycle, meaning that they only are expenses every four years. Historically, capital purchases have been a part of the operating budget for the various departments/committees. This is not optimal, as it makes it difficult to prioritize capital requests across departments. For example, when faced with a decision of a new computer for the Church Administrator vs. repaired floors in the RE classrooms, allocations within each budget area do not easily allow for such decisions to be made. It also means there can be wide swings in expenditures, as evidenced...
by the previously noted Computer categories, which were correct for FY15 but quite over-funded for FY16.
As such, starting in FY17, there is a new line item “Capital Purchases”. This is intended to be used at the discretion of Parish Committee, on important items that are outside the operating budgets. This is separate from Contingency (which is intended to cover unanticipated expenses such as emergency building repairs), and is not intended for large but regular expenses such as the floor refinishing of Parish Hall (which truly is an operating cost of running the church).

It is envisioned that departments/committees will submit their list of requests to Parish Committee, who will review them, and maintain a running list of the requests. It is expected that requests will exceed available funds (perhaps by a wide margin), so requests will carry over year-to-year. Examples of items that could be on this list include floor repair, sanctuary sound system improvements, A/V equipment for sermon broadcasts, or significant one-time expenses that aren’t appropriate for the operating budget.

The initial funding for this category is minimal for FY17 (only $2,000), but it is hoped that this will increase in future budgets. Decisions on the expenditures will be made at a later time, and Parish Committee will work with church committees on defining requests and priorities.

**FY17 Budget**

Through the generosity of the congregation, responding to the “Leap Ahead!” pledge drive, we project pledge and donation income receipt to be approximately $346,000 for FY17 (planning for a 97% collection rate of the total expected pledge commitment of $356,000). This pledge commitment is a 5.3% increase over FY16 (less than the 7.6% increase last year, and about the same as the 5.4% increase in FY15). A Mini-Auction is planned for FY17, which is expected to raise approximately $5,000. As described in last year’s report, the FY16 Auction has a built-in carry-over of $10,000 to FY17. Additionally, we expect to receive approximately another $101,000 from various sources (building rental being the single largest source), for a budgeted total income of $452,181.

Our budget has expected expenses of $462,181 (inclusive of the Capital Purchases), leaving $6,232 as unallocated (but spendable) contingency, and ($10,000) as “negative net income” (i.e., a $10,000 shortfall, which is covered from the FY16 Auction). Next year (FY18), we likely will run another Auction, which will likewise spread its income over FY18 and FY19. It is important to note that this budget is intentionally not “balanced”, due to this planned shortfall.

The tables on the following pages provide first a high-level view of the budget on the first page (all income lines and a summary of the expense lines), and then complete detail per category on subsequent pages. Variance from FY16 budget is shown where there were changes. This budget was approved by the Parish Committee at the April 13, 2016 meeting.

We extend our gratitude to the membership of the congregation for its generosity and commitment to First Parish, enabling us to fund the programming of the church in a way that is as fair and beneficial to all as possible. We look forward to a wonderful 2016-2017 church year!

Refer to the following pages for financial figures.
### Annual Report of First Parish in Needham, Unitarian Universalist

#### FY16 Budget vs. FY17 Budget

<table>
<thead>
<tr>
<th>Income</th>
<th>FY16 Budget</th>
<th>FY17 Budget</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Pledges and Donations (FY16)</strong></td>
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<td>$346,000.00</td>
<td>$18,000.00</td>
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<tr>
<td><strong>Fundraising</strong></td>
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<tr>
<td><strong>Homegrown Coffee House</strong></td>
<td>$7,500.00</td>
<td>$7,500.00</td>
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<td><strong>Investment Income</strong></td>
<td>$4,000.00</td>
<td>$4,000.00</td>
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<tr>
<td><strong>Fourth Century Fund Youth Income</strong></td>
<td>$2,860.00</td>
<td>$2,860.00</td>
<td>$0.00</td>
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<tr>
<td><strong>Plate - First Parish Collection</strong></td>
<td>$10,000.00</td>
<td>$12,000.00</td>
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<tr>
<td><strong>Bldg Rent - NCC</strong></td>
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<td>$44,821.00</td>
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<tr>
<td><strong>Bldg Rent - Ballet</strong></td>
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<td>$21,000.00</td>
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<tr>
<td><strong>Bldg Rent - Misc</strong></td>
<td>$9,000.00</td>
<td>$9,000.00</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td>$444,937.00</td>
<td>$452,181.00</td>
<td>$7,244.00</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Expense</th>
<th>FY16 Budget</th>
<th>FY17 Budget</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Building</strong></td>
<td>$85,330.00</td>
<td>$93,490.00</td>
<td>$8,160.00</td>
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<tr>
<td><strong>Total Community Outreach</strong></td>
<td>$1,500.00</td>
<td>$1,500.00</td>
<td>$0.00</td>
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<tr>
<td><strong>Total Community Within</strong></td>
<td>$4,650.00</td>
<td>$5,000.00</td>
<td>$350.00</td>
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<tr>
<td><strong>Total Education</strong></td>
<td>$80,951.50</td>
<td>$90,737.50</td>
<td>$9,786.00</td>
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<tr>
<td><strong>Total Ministry</strong></td>
<td>$106,778.00</td>
<td>$106,778.00</td>
<td>$0.00</td>
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<tr>
<td><strong>Total Music</strong></td>
<td>$49,164.00</td>
<td>$54,650.99</td>
<td>$5,486.99</td>
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<tr>
<td><strong>Total Office/Governance Expenses</strong></td>
<td>$78,220.00</td>
<td>$80,889.17</td>
<td>$2,669.17</td>
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<tr>
<td><strong>Total Denominational Affairs</strong></td>
<td>$20,113.00</td>
<td>$20,903.00</td>
<td>$790.00</td>
</tr>
<tr>
<td><strong>Total Other Expenses</strong></td>
<td>$8,230.50</td>
<td>$8,232.34</td>
<td>$1.84</td>
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<tr>
<td><strong>Total Expense</strong></td>
<td>$434,937.00</td>
<td>$462,181.00</td>
<td>$27,244.00</td>
</tr>
<tr>
<td><strong>Net Income</strong></td>
<td>$10,000.00</td>
<td>($10,000.00)</td>
<td>-$20,000.00</td>
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<tr>
<td>Category</td>
<td>Income 15-16</td>
<td>Income 16-17</td>
<td>Difference</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------</td>
<td>--------------</td>
<td>------------</td>
</tr>
<tr>
<td>Bldg Rent - Misc</td>
<td>$9,000.00</td>
<td>$9,000.00</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td><strong>$444,937.00</strong></td>
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<td><strong>$7,244.00</strong></td>
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</tbody>
</table>

### Building Expense

<table>
<thead>
<tr>
<th>Category</th>
<th>Income 15-16</th>
<th>Income 16-17</th>
<th>Difference</th>
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<tbody>
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<td>Sexton Comp</td>
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<td>$10,000.00</td>
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<tr>
<td>Sexton Payroll Tax</td>
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<td>Cleaner Comp</td>
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<td>Cleaner Payroll Tax</td>
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<td>Cleaning Services</td>
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<tr>
<td>Electricity</td>
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<td>$1,100.00</td>
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<tr>
<td>Gas</td>
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<td>Water Sewer</td>
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<td>$200.00</td>
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<tr>
<td>Landscaping</td>
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<tr>
<td>Snow Removal</td>
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<td>Maintenance</td>
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<td>Repairs</td>
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<td>Waste Removal</td>
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<td>Insurance</td>
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<tr>
<td><strong>Total Building</strong></td>
<td><strong>$85,330.00</strong></td>
<td><strong>$93,490.00</strong></td>
<td><strong>$8,160.00</strong></td>
</tr>
</tbody>
</table>

### Community Outreach

<table>
<thead>
<tr>
<th>Category</th>
<th>Income 15-16</th>
<th>Income 16-17</th>
<th>Difference</th>
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<td>Social Action Committee</td>
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<td><strong>Total Community Outreach</strong></td>
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### Community Within

<table>
<thead>
<tr>
<th>Category</th>
<th>Income 15-16</th>
<th>Income 16-17</th>
<th>Difference</th>
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</thead>
<tbody>
<tr>
<td>Archive</td>
<td>$300.00</td>
<td>$500.00</td>
<td>$200.00</td>
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<tr>
<td>Fellowship</td>
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<td>Hospitality</td>
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<td>Membership</td>
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<td>Small Group Ministry</td>
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<tr>
<td>Pastoral Care</td>
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<td><strong>Total Community Within</strong></td>
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<td><strong>$5,000.00</strong></td>
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### Education

<table>
<thead>
<tr>
<th>Category</th>
<th>Income 15-16</th>
<th>Income 16-17</th>
<th>Difference</th>
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<tbody>
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<td>DRE Comp</td>
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<tr>
<td>Category</td>
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<td>2016</td>
<td>Diff</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>------------</td>
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<td>-----------</td>
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<tr>
<td>DRE Insurance</td>
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<tr>
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<td>Youth Group Advisor Payroll Tax</td>
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<td>Lay Leadership Development</td>
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<td>Adult Education</td>
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<td><strong>Total Education</strong></td>
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<td><strong>$90,737.50</strong></td>
<td><strong>$9,786.00</strong></td>
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<tr>
<td>Ministry</td>
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<td>In Lieu of FICA</td>
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<td>Minister Pension</td>
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</tr>
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<td>Minister Insurance</td>
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<td>Minister Professional Expenses</td>
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<td>Minister Discretionary Fund</td>
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<td>Student Minister Payroll Tax</td>
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<td>$0.00</td>
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<tr>
<td>Worship Committee</td>
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<td>Guest Ministers</td>
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<td>$3,150.00</td>
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<td>Worship Committee - Other</td>
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<td><strong>Total Worship Committee</strong></td>
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<td>Flowers</td>
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<td>Summer Pastoral Care</td>
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<tr>
<td><strong>Total Ministry</strong></td>
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<td><strong>$106,778.00</strong></td>
<td><strong>$0.00</strong></td>
</tr>
<tr>
<td>Music</td>
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</tr>
<tr>
<td>Music Director Comp</td>
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<td>$2,500.00</td>
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</table>
## Music Director Pension
- 2015: $2,200.00
- 2016: $2,501.50
- Change: $301.50

## Music Director Insurance
- 2015: $600.00
- 2016: $600.00
- Change: $0.00

## Youth Music Director Comp
- 2015: $9,000.00
- 2016: $10,765.00
- Change: $1,765.00

## Youth Music Director Payroll Tax
- 2015: $684.00
- 2016: $818.14
- Change: $134.14

## Music Accompanists/Singers
- 2015: $5,000.00
- 2016: $5,000.00
- Change: $0.00

## Music Expenses
- 2015: $5,200.00
- 2016: $5,200.00
- Change: $0.00

Total Music:
- 2015: $49,164.00
- 2016: $54,650.99
- Change: $5,486.99

---

## Office/Governance Expenses

### Admin Comp
- 2015: $38,000.00
- 2016: $39,993.00
- Change: $1,993.00

### Admin Payroll Tax
- 2015: $3,420.00
- 2016: $3,599.37
- Change: $179.37

### Admin Health Benefits
- 2015: $4,800.00
- 2016: $4,800.00
- Change: $0.00

### Admin Pension
- 2015: $3,800.00
- 2016: $3,999.30
- Change: $199.30

### Admin Insurance
- 2015: $600.00
- 2016: $600.00
- Change: $0.00

### Bookkeeper Comp
- 2015: $2,750.00
- 2016: $2,750.00
- Change: $0.00

### Bookkeeper Payroll Tax
- 2015: $247.50

### Bank and Credit Fees
- 2015: $1,000.00
- 2016: $1,000.00
- Change: $0.00

### Office Equipment & Copier
- 2015: $5,500.00
- 2016: $5,500.00
- Change: $0.00

### Computer Hardware
- 2015: $3,500.00
- 2016: $1,500.00
- Change: -$2,000.00

### Computer Services & Software
- 2015: $4,500.00
- 2016: $1,500.00
- Change: -$3,000.00

### Supplies
- 2015: $3,200.00
- 2016: $5,000.00
- Change: $1,800.00

### Payroll Fees
- 2015: $600.00
- 2016: $600.00
- Change: $0.00

### Postage
- 2015: $1,500.00
- 2016: $1,000.00
- Change: -$500.00

### Publicity
- 2015: $600.00
- 2016: $600.00
- Change: $0.00

### Telephone/Internet
- 2015: $4,000.00
- 2016: $4,000.00
- Change: $0.00

### Website Expense
- 2015: $1,000.00
- 2016: $1,000.00
- Change: $0.00

### Parish Committee
- 2015: $600.00
- 2016: $600.00
- Change: $0.00

### Stewardship
- 2015: $1,500.00
- 2016: $1,500.00
- Change: $0.00

### Human Resources & Recruiting
- 2015: $500.00
- 2016: $500.00
- Change: $0.00

Total Office/Governance Expenses:
- 2015: $78,220.00
- 2016: $80,889.17
- Change: $2,669.17

---

### Denominational Affairs

#### Dues - Massachusetts Bay
- 2015: $4,693.00
- 2016: $4,883.00
- Change: $190.00

#### Dues - UUA
- 2015: $14,820.00
- 2016: $15,420.00
- Change: $600.00

#### General Assembly
- 2015: $600.00
- 2016: $600.00
- Change: $0.00

Total Denominational Affairs:
- 2015: $20,113.00
- 2016: $20,903.00
- Change: $790.00

---

### Other Expenses

#### Capital Purchases
- 2015: $2,000.00
- 2016: $2,000.00
- Change: $0.00

#### Contingency
- 2015: $8,230.50
- 2016: $6,232.34
- Change: -$1,998.16
<table>
<thead>
<tr>
<th></th>
<th>2015-16</th>
<th>2016-17</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Other Expenses</td>
<td>$8,230.50</td>
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<td>Net Income</td>
<td>$10,000.00</td>
<td>($10,000.00)</td>
<td>-$20,000.00</td>
</tr>
</tbody>
</table>

*NOTE: This budget is intentionally not “balanced” – it has a $10,000 deficit, due to the planned $10,000 surplus from the FY16 Auction (whose revenue was spread over two fiscal years).*
AUDITOR'S REPORT  
Fiscal Year 2015-2016  
Auditor: Gray Brown

To the Members of First Parish Needham  

May 10, 2016

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, 2016 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
2013-2014 Fiscal Year

Trustees: Nancy Simpson-Banker, Phil Murray, and Dick Eastman

2015-16 Trustees of Invested Funds Annual Report

The Trustees had regular quarterly meetings this year. The principal areas of focus included: the group’s division of operating responsibilities, fund transaction accounting, and a review of the fund’s performance.

The Trustees undertook a final accounting of unpaid pledges for the Fourth Century Fund. $5,900 was collected. $6,250 in pledge payments were deemed uncollectable and written off. Another $7,700 in pledge payments were identified as having been misallocated to past budget drives. That money is in the First Parish Citizen’s Bank account. The Trustees are waiting for it to be transferred to the Fidelity account.

Article VIII Duties of the Officers, Section 6 states
Subject to any restrictions applicable to income earned on restricted gifts, legacies, or special purpose funds, the Trustees shall pay over to the Treasurer annually a percentage of funds equal to the previous year’s Consumer Price Index (CPI) as defined by the Bureau of Labor Statistics, bounded by a minimum payment equal to two percent of the applicable funds and a maximum payment equal to five percent of the applicable funds.

This bylaw section was drafted at a time when average market returns were substantially greater than they are today. Presently, we are running the risk of depleting our endowment to help fund our Operating Budget. The Trustees feel that the fundamental purpose of the endowment is to be a growing source of funds for future major construction and refurbishment projects, and not to be a source of funds for the church’s Operating Budget. We are in a period of negative interest rates and believe the church should review and amend the above bylaw.

The Trustees are very concerned that the church’s financial records appear to not properly reflect all transactions between the operating account and the Invested Funds. We are also concerned that timely reconciliations between the church’s Quickbook records, Realm pledge/Campaign records, and bank transactions are not being done.

The Reverend Catie Scudera met with the Trustees in December to initiate a process to grow the church’s endowment. Subsequently the Trustees had a teleconference meeting with the Reverend Laura Randall, Legacy Gifts Manager at UUA headquarters. On October 16 Laura will be a guest preacher and workshop leader telling us how other churches have been able to grow their endowments.

Respectfully submitted,

Nancy Simpson-Banker, Philip Murray, Richard Eastman

Attachment: Invested Funds Report
First Parish in Needham - Endowment Funds
Consolidated - Fidelity Cash and UUCEF

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>FPC Pledges</th>
<th>General</th>
<th>Buehrens</th>
<th>Memorial</th>
<th>Music</th>
<th>Ministerial Settlement</th>
<th>Period Perf</th>
<th>Qtr Perf</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cumulative</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beginning Balance, 3/31/15</td>
<td>615,973.64</td>
<td>-</td>
<td>207,624.64</td>
<td>147,393.62</td>
<td>23,871.93</td>
<td>37,083.45</td>
<td>200,000.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additions</td>
<td>39,586.58</td>
<td>19,411.58</td>
<td>-</td>
<td>18,420.00</td>
<td>1,755.00</td>
<td>-</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Withdrawals</td>
<td>(31,263.93)</td>
<td>(19,411.58)</td>
<td>(7,684.02)</td>
<td>(3,686.65)</td>
<td>(481.68)</td>
<td>-</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfers</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Income / Investment Change</td>
<td>(24,110.66)</td>
<td>-</td>
<td>(10,501.56)</td>
<td>(10,298.87)</td>
<td>(1,343.89)</td>
<td>(1,966.34)</td>
<td>-</td>
<td>2.87%</td>
<td>-0.12%</td>
<td>-3.89%</td>
</tr>
<tr>
<td><strong>Current Balance, 3/31/16</strong></td>
<td>600,185.63</td>
<td>-</td>
<td>189,439.06</td>
<td>151,828.10</td>
<td>23,801.36</td>
<td>35,117.11</td>
<td>200,000.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
1. Withdrawals during the period related to FY14 and FY15 distributions in accordance to by-laws and final settlements for Capital improvements.
2. FPC pledges are stock donations cleared through Fidelity account. Stocks are sold as soon as possible after receipt.
3. FY16 distributions ($6,940) in accordance with by-laws from General and Buehrens funds will occur in early May. Distributions were based on June 30, 2015 market values of the two funds and represent the minimum (2%) distribution per the by-laws.
   General Fund MV $199,398.84 * 2% = $3,998; Buehrens MV $147,584.37 * 2% = $2,952
4. Asset holdings as of March 31, 2015 and 2016:
   - Fidelity Cash Reserves 147,959.10 19,047.52
   - Unitarian Universalist Common Endowment Fund 268,014.54 381,138.11
   - Ministerial Settlement Loan 200,000.00 200,000.00

|                        |        |             |         |          |          |       |                        |             |          |      |
|------------------------|--------|-------------|---------|          |          |       |                        |             |          |      |
|                        | 615,973.64 | 600,185.63 |         |          |          |       |                        |             |          |      |