

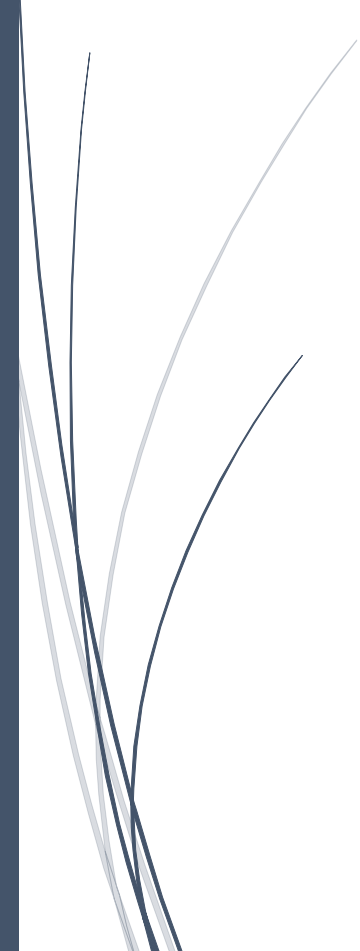


June 13, 2021

Annual Report

2020-2021

First Parish in Waltham, Universalist Unitarian, Inc.



Please bring this Report to the Annual Meeting

The First Parish in Waltham, Universalist-Unitarian, Inc.

WARRANT

The legal voters of The First Parish in Waltham, Universalist-Unitarian, Inc. are hereby notified that the Annual Meeting of the Corporation will via Zoom web conferencing on Sunday, June 13, 2021, immediately following service to act on the following articles:

Article 1. To receive the reports of the Ministers, Director of Community Engagement, President of the Board of Managers, Commissioners, Clerk, Treasurer, Assistant Treasurer, auxiliary organizations, and the Trustees of Permanent Funds.

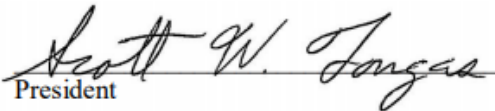
Article 2. To receive the report of the Nominating Committee, and to elect members to fill open positions.

Article 3. To vote on the budget proposed by the Board of Managers for the year beginning June 1, 2021.

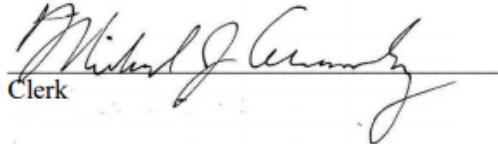
Article 4. To vote on the recommendation of the Board of Managers to spend up to \$8,000 from the Theodore and Nathalie Jones Charitable Trust for the Benefit of First Parish in Waltham (the Jones FBO Trust) for the installation of audio and video equipment for the purpose of providing online access to church service based on recommendations of the Reopening Steering Committee.

Article 5. To transact any other business which may legally come before the meeting.

By order of the Board of Managers **May 26, 2021.**



President



Clerk

Posted: May 27, 2021



*A Welcoming
Unitarian Universalist Congregation*

Our Covenant

Love is the spirit of this church and service is its law. This is our great covenant, to dwell together in peace, to seek the truth in love, and to help one another.

Our Mission

The mission of First Parish in Waltham is to be a welcoming, compassionate, and inclusive community of all ages, seeking spiritual growth and fellowship through worship, free inquiry and service, while striving for a just, peaceful and sustainable world.

In our Vision, First Parish will be a place...

- ...which has many meaningful social, cultural, and educational programs for all ages, resulting in dynamic energy visible to ourselves and to the greater community.
- ...which has increased its membership and broadened its diversity.
- ...where children, youth, and adults are developing and nurturing their spirituality.
- ...which has enhanced its stewardship of our physical plant in a manner consistent with our environmental principles.
- ...which has greater financial support from its members and relies less on its endowment for operating expenses.
- ...which has social action programs that connect us to our values, and to other churches and the world community.
- ...which is a safe and supportive environment for all.

Adopted June 5, 2005

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STAFF REPORTS

President's Report

This year's Board of Managers consisted of:

- Donna Vanderclock – Finance Commissioner
- Dan Taylor – Properties Commissioner
- Pam Penton – Membership Commissioner
- Brenda Asis – Music and Worship Commissioner
- Plum Kennard – Social Action Commissioner

In addition, Michael Carmody served as Clerk, Janet Riley as Treasurer, Leslie Gildersleeve as Assistant Treasurer, Bill Vanderclock as Moderator.

David Wilbourn, Joel Weddig, and Barry Stearns served as the Trustees of the Permanent Funds.

As I start to right this report, rain beats on the windows outside of my quiet, cozy house. This somehow feels like a metaphor for this year. We have now spent an entire year as a community riding out the storm of the pandemic. Staying more to ourselves and relying on the ever improving technologies of communication to keep us connected to the voices and faces around us. Yet, just the other day, I found myself shaking someone's hand for the first time in over a year, and other signs of renewal abound. I just sent out the debut email to the Congregational Reopening Steering Committee (the Reopening Team). Although the team will have many involved discussions, this group gets see itself as "the party team".

We actually get to plan ways for us to be together!

Another of the major challenges of the year was the announcement that our dear Reverend Marc would be retiring this summer. Luckily, the UUA has tremendous resources for helping congregations through ministerial transitions, and we took full advantage of it. The board met with our regional transitions coach and put together a timeline for the next two years. We formed a small interim search committee consisting of Brenda Asis, Pam Penton, Donna Vanderclock, and myself. We interviewed five candidates, and in the end we were pleased to have a match with one of our favorites. On August 16th we will be joined by the Reverend Fieda Gillespie who will serve as our interim minister for the next two years. Her first year with us should be one of introspection and goal setting. In the spring we will choose a Search Committee. The following year will be spent supporting them in the search for a settled minister.

As always, the board set goals in the fall. Below is an overview of the goals with comments on progress.

Caring for One Another –

- Pastoral Care
 - Maintain the outreach that the lay pastoral care team has had during COVID
 - Find ways to engage our teenagers, college students, and families with young children.
- Membership
 - Attract new members and get them engaged when we don't have our previous ways (coffee hour, use of bldg.)
- Watch out for burnout and identify changing needs
- Showing appreciation for each other, including those we haven't met yet

Progress – The Care Team, led by Daphne Blount put tremendous energies into sending cards on a regular basis to all members and youth in the church. I know that this was meaningful to many recipients, especially those with limited computer access. Our partnership with Chaplains on the Way was one of the highlights of the year. Cooking and serving for the unhoused community gave a sense of purpose and meaning to all involved. Support for this program involved people of all ages, and also drew in the help from many outside of the First Parish Circle. Rev. Marc held two congregational meetings to get people more engaged in Pastoral Care. We still have a ways to go with this, but one thing that became clear is that we need to create better systems that make it easier to spread the work and allow people to more easily step into pastoral care roles.

Caring for the World –

- Fostering Anti-Racism
 - Educate ourselves (the church community)
 - Act on what we've learned
 - Focus on our own community (which includes the church and Waltham and area)
 - Include issues of Environment and Immigration

Progress – Last year when the congregation voted to hang the black lives matter sign on the church, we also to educating ourselves more on anti-racism. The Social Action Team, led by Candace Holman, did a great job of providing opportunities for that this year. With both internally lead sessions as well as sessions lead by an outside consultant, we explored topics such as micro-aggressions and different levels and kinds of oppression. We also spent time thinking about how we would apply this information in situations that might come up within our congregation. There is still more work to do to expand this awareness and action into our congregation, our community, and the world.

Spiritual Sustenance –

- Sunday services
 - Fine tune use of technology,
 - Create at church option for members who don't have Zoom access
 - Start planning for Fall 2021
 - Reinvent the “pink sheet” to consistently provide programming that makes meaning
- Survive - with Joy!
 - Give people activities to look forward to
 - Find fun, online fundraising opportunities
- Small Group ministries:
 - expand SGM

Progress –

- Two years ago it would have been unfathomable that our congregation would spend over a year worshipping together via our computers, but the pandemic has really proven that our church is not about the building. Reverend Marc, Reverend Becky, Devin, and Emma became very proficient at setting up slide decks and recordings that consistently brought meaning to our services. They were supported by many volunteers who ran the Zoom services and brought a high level of reliability.

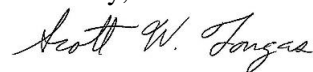
- Sue Genser spent many Sunday mornings setting up the Zoom service on the AV system for people who did not have computers at home.
- A Congregational Reopening Steering Committee has been formed to plan how we will get back together in the fall. They will also look at adding technologies to allow for the streaming and possible remote Zoom attendance of services.
- We also succeeded in having many events outside of service to bring people together, including walks in places like the Gore Estate, a Zoom Christmas caroling event lead by the choir, and the online silent auction and talent show, hosted by the Strafford Family.
- Brenda Asis and Andy LeCompte are each leading a small group ministry. They are both well attended. There is also a crafts group that has been meeting online, organized by Nancy Lawrence and Muffy Young.

As I look through this list, I'm pleased to notice that the goals don't look particularly difficult, but I think that is mainly because we have been doing most of this! When setting the goals, one of the primary ones felt like just the need to survive. We tried to set the tone of surviving with joy, and as people settled into new routines with web conferencing, we actually found many new ways to stay connected, energized, and supportive. And in many ways, we were able to accomplish things that would have been harder in person. Whitcomb Hall became a gathering place for the unhoused. We studied anti-racism with a leader from California. Our membership held steady, and we still managed to get a few new faces and members. And people were more on time for meetings!

Our choir recently produced a recording of the gospel song Hold Out which tells the listener to hold out through the darkness for the morning sun. As I sit here looking out at the grey clouds, I know that I can hold out with the utmost certainty that "the sun is gonna shine". And I look forward to being there for it with all of you.

I would also like to thank our staff for their tremendous work and flexibility in this disruptive year. Emma Campbell, Richard Farina, Rev. Marc Fredette, Chris Johnson, Rev. Becky Sheble-Hall, and Devin Shmueli. It has been a pleasure to watch them support each other and learn and grow as they keep the vision of First Parish in Waltham alive.

Sincerely,



Scott W. Tougas

Minister's Report

"Church is a place where you get to practice what it means to be human."

-- James Luther Adams

Our fifteenth and final year of shared ministry well confirms my belief that answering your call to serve as your minister is perhaps the best decision I have ever made. Not the easiest by a long shot, but a healthy combination of challenge and reward, angst, and joy. I feel immeasurably privileged to have served a congregation in which so many people show such consistent devotion and commitment to their church.

Much of organizational life is determined by the quality and sensibility of the systems which give it form, but form is nothing without a positive energy and spirit to invigorate it, and these are in no short supply here at First Parish. I am glad to report that despite a global pandemic and the need to do most of the work

of the church via Zoom this year, the spirit of First Parish is very much alive and well.

There are lots of reasons why we devote our time, energy, creativity, and financial resources to the church, but I believe that above all else we participate in church life to become better humans: more honest, grounded, compassionate, more courageous, and curious, more principled, respectful, joyful, relational, and more present. We come to be awake—to see life as it is, not as we wish it were, and to learn to give life our best.

At the center of our shared church life are the ministries which touch and change lives – Worship, Pastoral Care, Religious Education, Adult Spiritual Development, Music, and Social Justice chief among them. In these ministries and all our others, we continue to grow and deepen how people are involved. We see new people stepping forward, whether volunteering for the Morning Program this past winter, or joining in one of the several Small Groups, or serving on a committee like the Response team or the newly formed “Reopening Team”. For these efforts, we should be thankful.

Sunday Worship – First Parish has strived to blend tradition with innovation, familiarity with risk in worship. Crafting Sunday worship during the pandemic, so as to allow for remote access (having church members share readings live and having small group discussions in real-time during the service) has been both challenging and rewarding. In our pre-pandemic, in-person worship services, many of the decisions about the service and most of the work in preparing for worship was mainly the responsibility of the minister. Generally, church members were asked to participate in the service moments before it began, and the lion’s share of the preparation happened on Friday and Saturday each week. Our need to worship remotely this year changed all that.

Early on last fall I realized that offering remote worship services of the caliber you have come to expect meant that planning for worship had to become a true team effort. Initially our Director of Community Engagement, Devin Shmueli, without hesitation volunteered to organize and lead a Technical Support team for worship; in January, our Music Director stepped in and has been doubling as Music and Choir Director and Technical Lead for nearly all services since then. In the past I often waited until my writing day to choose readings and hymns; for remote-access services (over Zoom) readings and hymns had to be chosen early in the week. Once hymn titles were chosen, Music Director, Emma, created a piano backtrack and then put out a call for volunteers to record voice over the piano backtrack. As soon as readings were chosen, I would reach out church members to lead them. For anyone who has attended a pre-service rehearsal on Sunday morning, you know that the worship team on any given Sunday morning often included eight to ten people! I’m grateful to everyone who has contributed to worship this year, crafters, leaders, and participants, and especially to the core team of volunteers who, under the guidance of first Devin and then Emma, provided technical support each and every Sunday. Bill and Donna VanderClock provided technical support when the pandemic began and continued to do so straight through the end of the last church year. Thankfully, this year Donna and Bill were joined by others, and I am so grateful to you all for supporting our worship services so faithfully. Special thanks to core support team -- Pam Penton, Elisse Ghitelman, Joan Smith, Dan Taylor, Janet Riley, and Donna and Bill VanderClock. Michael Carmody, Charlie Kelley, and Sue Genser also pitched in.

Pastoral Care – Meeting with members and friends of the congregation with pastoral concerns remains one of the greatest privileges and responsibilities of parish ministry. When a loved one has died, when some unexpected change effects our lives, when stresses surface for individuals and sometimes for families, it is a privilege to journey with you through difficult or uncertain times. At some point we will all need the loving companionship or assistance of a pastoral caregiver, and we should all be willing to offer (and expect to be called on to provide) pastoral assistance to others as part of our covenantal commitment to one another here at FPW.

Like many areas of church life, the Pastoral Care program at First Parish is in transition. We held two all-church forums on Pastoral Care earlier this spring during which I presented my ideas for revitalizing a member-led Pastoral Care Team. This is work in progress and during this time Daphne Blount will continue to lead and (with your willingness to help) coordinate and delegate the day-to-day tasks of Pastoral Care. I'm very grateful to Daphne and the provisional team she gathered during the pandemic to watch over and reach out to church members. There is no doubt that the willingness to serve and to offer pastoral assistance is alive and well at First Parish; what's wanting is the system by which pastoral care is managed.

Administration – Any recognition I receive for a job well done must be shared with our staff. I feel deep gratitude to our staff team. The combined talents and experience of Director of Community Engagement, Devin Shmueli, Music Director, Emma Campbell, Office Manager, Chris Johnson, and Groundskeeper, Richard Farina are a gift to us all. They were a solid team before the pandemic, and during the pandemic they have gone above and beyond the call to support the congregation and nurture its ministries. Except for the Groundskeeper, they have all worked from home, teleconferenced all meetings, events, and in the case of the choir, even rehearsals. Devin and Emma, especially had to find new and innovative ways to nurture their ministries. We are blessed to have such a talented and committed staff team working in support of all facets of church life.

Volunteer Leadership – We are blessed to have a leadership culture which successfully reflects our vision of what church and beloved community can be. I want to thank especially Scott Tougas for his leadership of our Board this year, and all the Commissioners and Board members who have served with Scott. Dignity, kindness, and thoughtfulness are the values that came through in the day-to-day work and in the way all Board members have rallied during this unprecedented year.

Generous Giving – Our monthly “Share the Plate” program is now celebrating its fourteenth year. As of May, the Share the Plate program has collected and distributed over \$4,496 since last June. This year's recipients included Neighbors Who Care, Boys and Girls Club of Waltham, Africano, Waltham Family School, Healthy Waltham, the Waltham Land Trust, the Waltham Philharmonic Orchestra, Opportunities for Inclusion (formerly GWarc) and UU Mass Action. Our share the plate collection scheduled for June will go to help provide SNAP vouchers to shoppers on tight budgets at the Waltham Farmers' Market. Your generosity is inspiring!

Looking Ahead – Even though we are nearing the end of our regular Sunday worship (next Sunday is our final services until next fall!), our shared ministry will continue until end of July. During this time, I will be available to meet with church members individually or with small groups and doing all I can to ensure a smooth transition to the interim.

As in years past, I will be looking forward to the challenges and opportunities next year will bring and encourage your own anticipation and excitement. Unlike years past, however, our future challenges and opportunities will no longer be shared. For your benefit and for the success of your next settled ministry, I must literally take my leave. The future well-being of a congregation is best assured by my fully effective departure from First Parish. Because congregations are especially vulnerable in periods of ministerial transition, I must take particular care to minimize my influence and presence within the congregation, as well as my interactions with church members and staff members. To put simply a rather complex situation, you will be unable to form strong relationships with a new minister if you and I are trying to maintain our past relationships.

According to the UU Ministers Association's Code of Conduct, “...there must be no intentional or ministerial contact between a departing minister and members or staff of congregations they have served until there can be a covenant expressed in a Letter of Understanding between outgoing and subsequent ministers. The provisions of this covenant should be arrived at through conversation and negotiation with an understanding that the well-being of the congregation and the new ministry is of primary importance.”

The Letter of Understanding will be one of my final ministerial tasks and one of Rev. Frieda's first, and it will be shared and mutual. As much as I care for you all deeply, my respect for and love of this congregation is even greater and must take precedence over our individual wants and needs. Will this be challenging? Maybe yes, maybe no, too soon to tell! Can it be done? Absolutely.

If I were moving away from Waltham, we would not need to discuss this much at all. What will perhaps be most challenging is knowing that we continue to live in close physical proximity, and still must all learn to give one another the gift of emotional and spiritual distance, until such time that your new settled minister is fully settled!

Some members have been seeking reassurances that I will still be around, and I will be. I just will not be around you in any significant way. Much will depend on the arrangement Rev. Frieda and I reach, but it's unlikely I will be meeting with you for coffee, or dinner any time soon. Despite the best agreements the fact remains that I will still be living in Waltham, and I imagine we will bump into one another while grocery shopping or attending local events. No worries. We can stop and exchange hugs and greetings and be happy with that. Please trust the system of succession that has been fine-tuned by UU clergy and lay leaders over many years. Doing so will only be possible, though, if we have faith in the future and in our capacity to adapt and grow.

I close now with deep thanks to each and every church member and friend of First Parish. Parish ministry is something we create together in the shared spaces we gather (in person and online). So, thank you, each and all, for everything. Thank you for the gifts you each bring and share with one another, and with me. It has been a privilege and joy to serve as your minister. We have been blessed, so let's keep the faith and keep the blessings flowing!

Much love,



Rev. Marc S. Fredette

Report from the Director of Community Engagement

Lifespan Religious Education Program

Childcare for Infants and Toddlers – COVID made it unsafe for us to gather as a congregation in our building and, likewise, our childcare for infants and toddlers became unnecessary. As we explore reopening, I have already started to consider how we can provide this offering moving forward. We will be ready to welcome new and returning younger families as soon as we can!

Friendship Finders – At the start of summer, I had planned to begin creating a curriculum for the new year with consideration for the limitations the children have while gathering in Zoom. I learned that keeping them focused longer than 30 minutes would be difficult. Rather than developing a new curriculum while performing increased community engagement efforts, I chose the new CartUUns curricula from Imagine RE which is a 33 Sunday curriculum that includes short cartoons for reflection. This was not a successful curriculum for this group and I returned to creating my own curriculum and programming.

On September 20th, we had our first Friendship Finders class in Zoom and on September 27th, we had an opportunity to gather together for an outdoor adventure with some adults from the congregation. Using CartUUns and the lesson plans I developed along with outdoor offerings, we had an incredible first half of the year of learning and adventure. In January, we pivoted to meeting on the 1st and 3rd Sunday of the

month continuing the practice of various Zoom and in-person activities like baking sun bread or making Valentine's Cards for the Morning Hours program community members. In April, we started an environmental education unit and planted a container garden with local environmental educator, Brad Baker. Some of the flowers planted will be featured during Flower Communion.

In June, we will begin a unit on our religious neighbors meeting with Rabbi David at Temple Beth Israel on June 6th and this unit will continue in the new church year. This was inspired by the curiosity piqued, when we attended the Tree and Garden Festival at Temple Beth Israel. The kids were curious about what was inside so I arranged for the rabbi to show us the Torah and tell us a bit about our Jewish neighbors. This will dovetail into next church year where, in the spirit of interim work, we will be thinking about who we are (Unitarian Universalists) and who are our neighbors (Religious and Community at large). I'm working with other clergy to get them to share something of their traditions and communities with our Friendship Finders.

Friendship Finders Family Notes – I continued to share the Soul Matters Soulful Home activities and other thoughts to parents for in-home RE engagement. These focus on the theme of the month and help parents carve out sacred space and time throughout the month. They focus on different areas of the home as frameworks for exploring the theme. After a few months, I learned this was not as engaging as I had hoped and discontinued sharing them and incorporated them into discussions when we met in Zoom. We also used Around the Neighborhood. The Around the Neighborhood activity engages families with their surroundings through the lens of the theme. Throughout the month, we ask families to keep their eyes open for what might seem like everyday sightings but which can be perceived in new ways through the monthly theme. Throughout the year, I tried to find ways to get families in discussion about their faith and I learned some things worked better than others. Moving into the new church year, I would like to explore new ways of creating conversations for the families at home.

Spirit Spark – Unlike previous summers, Spirit Spark was held twice over the summer in July and August. I worked with Regie using different Soul Matters theme packets from previous years. We decided the themes of Covenant and Risk were important. I also met with Ann Miller to have her join us in November and December for her special Jones Partnership Spirit Sparks. These offerings were held once a month October through April five times with Regie Gibson and twice with Ann Miller.

Youth Group – During the pandemic, it proved difficult to bring the youth together. It is my hope that I will revive the youth group in the coming church year. It is likely that our middle school youth will be those who become active and help us to develop a robust program for years to come.

Adults – Over the summer, I continued to host a few opportunities for adults to connect through Religious Education programs with Tuesdays Thoughts and Mid-Week Meet-Up (for all ages). These ended up serving as open office hours for many people and it was great to maintain connection with those who needed special attention. We also had various Zoom offerings like JT Turner's A Christmas Carol which was almost as well attended as when it had been offered in-person.

In March, I supported Rev. Becky and Rev. Marc as they prepared for the March 21st pastoral care forum using my experience consulting for congregations around developing congregational care programs. In April, I found a consultant that is the right fit for us and our needs named Stephanie Seales. Over the course of the first three Sundays in May, she provided us with an anti-racism curriculum that was custom tailored for us and our priorities.

Rituals – At the start of the new church year, I helped with the planning for the Homecoming Service, and continued to do the work of incorporating stills, video, and music. During the holidays, I initiated the Holiday Care Packages that included a card and chalice chocolates among other things. In April, I shepherded the Interfaith Service Marking One Year with the Waltham Ministerial Alliance. We marked

one year since our buildings closed and our congregations migrated to virtual services and programming. It took place on March 14th at 5:00 PM. Later, as a congregation, we honored two high school seniors, Lulu Ohm and Jeremy Tougas-Watt, in a Bridging Ceremony on May 16th, 2021 in Zoom. We recognized and celebrated their journey from youth to young adulthood.

Support of the Committees/Commissions and Ministries of First Parish – After the events of the last annual meeting with the Black Lives Matter banner, I held a listening session for a small subgroup of the social action team. This resulted in a few key points that were carefully addressed over the summer including the formation of a transition team with the social action and outreach commissioner. I met with them several times as they developed a statement to present to the board. I also met with social action team members as follow up to learn about the ways they needed support in this transition.

This church year, I supported the work of and attended Board of Managers, Social Action, Worship, and Care meetings. Initially, I supported the work with the leadership of the Jones Partnership Fund Committee but this quickly pivoted towards bringing in these partners for various activities. This year, the pandemic created some concerns around these activities and still we created Zoom offerings with some partners. I met with the Annual Fundraiser Team to discuss my support of and during their event on March 13th.

Welcoming and Worship – I assisted the Summer Worship Team (Pam, Brenda, Michael Carmody) in their work towards creating and leading summer services. This was an amazing opportunity for the congregation during these troubling times and it was a joy to support them during the week on Wednesdays and on Sunday mornings for rehearsal and tech support during the service. More than previous years, they had about 40 people each Sunday. I picked up the Secret Seekers program in October and we had nine visitors that evaluated our welcome and inclusion (but they were not asked to comment on the service). The program was created so that I did not know when they would visit but they had the opportunity to do so at their leisure.

For the first half of the church year, I took on the work of serving as tech lead for worship on Sunday morning until Emma took over for me in January. I carefully crafted slide shows to be shared during the service for screen sharing, led our pre-service rehearsal, and managed the technical aspects of our service. I also trained our tech team to share in the work of making worship happen.

Professional Development – I continue to stay connected with colleagues formally at LREDA meetings and informally one-on-one, as well as in professional development offerings. Last year, I became an accredited Interim Religious Educator and now belong to the Guild of Interim Religious Educators.

COVID-19 and Zoom – As a member of the COVID Response Team, we discussed ongoing concerns of closure and extending virtual programming. I also have helped manage scheduling various church meetings in our two Zoom accounts and refined a process for people to use the spaces without needing to start the meeting. This has helped to ensure that meetings are scheduled and do not overlap. It has been decided that I will support the work of the Reopening Team, too.

Thank you for making this another bright year. I am so grateful to each of you for welcoming me back after my brief departure in January, and I appreciate this second chance. We are about to have an incredible interim period and I look forward to the journey with you.

Respectfully Submitted,
Devin Shmueli
Director of Community Engagement

Report from the Affiliate Minister

What a year we have had! Together, we have sharpened our zoom skills, created innovative and meaningful worship, bonded in breakout room discussions, and responded with courage and compassion towards our unhoused neighbors during the COVID pandemic when they felt particularly vulnerable and forgotten.

My role as your Affiliate Community Minister is primarily about building bridges between First Parish and marginalized communities in Waltham. My goal is to help us live our Unitarian Universalist faith and values outside the walls of our church. Because I am also a chaplain at Chaplains on the Way, (COTW) this connection has been to the community of people experiencing homelessness in our city. In the past, that meant learning to welcome that community into the pews of our sanctuary, offering a Christmas Eve dinner, or for some, volunteering with COTW. It meant that you heard their stories of struggle and resilience in my sermons. It meant those folks are added into our prayers and we hold them as a congregation in our hearts.

But this winter, when all the regular places for unhoused people to find warmth were closed, FPW went beyond what had become familiar, in order to provide a warm and welcoming space inside Whitcomb Hall for Chaplains on the Way to serve breakfast 5 days a week. Members of FPW dropped off hot breakfast casseroles, brought fruit, cooked muffins, while others volunteered in the kitchen or joined COTW spiritual practices. (Big shout out to Pam Penton...the Queen of Schedule Genius!!) The food was abundant and delicious!! And it's no exaggeration to say that this experience eased the isolation of our guests, who suddenly felt themselves in relationship with "The banana muffin lady", or that crazy woman in the kitchen, Elisse Ghitelman who memorized how each guest liked their coffee and greeted them with a mug in her hand. This breakfast continues on Tuesday and Thursday mornings, followed by spiritual practices which FPW members often attend too.

Offering our fellowship hall to this community, at time when FPW parishioners were not themselves allowed to gather inside the church, is a brave and beautiful example of what it means to really live by our Unitarian Universalist Principles. As Dr. Martin Luther King taught us, and we've captured in our 7th Principle, we at First Parish understand that we cannot be all of who we are meant to be unless all people can have that same privilege. Offering relationship, dignity and respect to people who feel forgotten and unworthy is what we are called to do. And I am so proud of how our church responded to that call.

My gratitude also goes to the small group of folks, organized by Plum Kennard, who zoomed regularly to support this work, and myself, from its initial glimmer of intent through those hectic next six months. There are really too many people for me to thank here, which is actually a beautiful thing. But please know that each gift of time or donation of food, funds or clothing was appreciated and necessary.

This my sixth year with First Parish, including one year as your ministerial intern. I'm grateful for the opportunity to create and lead worship here and for the times I've taken a risk or done something differently which helped me to grow in that capacity. I appreciate also those who have sought me out for pastoral care. I look forward to working with Daphne Blount to help form and support our lay pastoral care team next year.

After three years in preliminary fellowship with the UUA, I received full fellowship this Spring. What I learned during this time with you, helped me in that process. Next year you will be compensating me at this new level. I look forward to seeing where our journey for justice and kindness towards neighbor will take us when we gather again in the Fall.

In Peace,
Rev. Rebecca Sheble-Hall

Music and Choir Director's Report

Instruments

Following last year's thorough assessment of the pianos owned by the church, we now have a second instrument that is fit for purpose. Following a funding drive to find the last of the costs, the Steinway Grand that is in the Sanctuary has had a major overhaul. The work was carried out by a local craftsman during the summer of 2020, while the church was not in use. The action and hammers were replaced and new strings replaced the existing ones. After a stabilizing period the instrument was tuned and voiced to suit the acoustics of the Sanctuary. Given that the church was going to be unheated for the winter period due to COVID, it was essential that the piano was found a temporary home so that the soundboard did not crack due to the increased stress new strings placed it under. It was relocated to the home of the Music Director and continued to be used for services, choir rehearsals and recordings of Preludes, Offertories and Postludes. It will be moved back to its correct home during the summer of 2021.

Choir

The Choir have worked incredibly hard to support the virtual services during the pandemic. They have lead hymns, and learnt to record themselves to contribute to ensemble recordings in a number of different ways. Some choir members have been instrumental in ensuring that recordings are expertly mixed – a task that requires more time than the job description for the Music Director permits. Some recordings have also made use of video techniques, reverb settings that were modelled on data captured from the Sanctuary itself, and virtual instruments. While the number of people involved in the choir has decreased, we have been pleased to be joined by some new members. To ensure efficient sharing of musical material a Shared Drive was established, allowing everyone easy access to copies of music, recordings for rehearsal purposes, and a place to store their completed recordings.

The Choir has proved to be an essential element in the musical life of the church this year and have continued to stretch themselves as individual ways that many of us had never imagined before. Through their hard work, we were able to host a Christmas carol concert, and Music Sunday took place in a recognizable form. We have missed seeing each other and look forward to rehearsing in person once it is safe to do so.

Music Library

The Music Library is still work in progress. Thanks are extended to Leslie Gildersleeve and Amy Eastwood for still trying to work through all the music when the church has been accessible. I hope that this task will be completed, with the help of choir members, once we can meet in person.

Emma Campbell
Music & Choir Director

COMMISSIONER REPORTS

Finance Commission

Thanks to many members and friends for your stewardship of our financial resources and contributions to our continued progress. Annual pledges of financial support from members and friends, support of fundraising efforts, plus our habit of conservative budgeting, make it possible for us to weather the impacts of the pandemic and current building closure without drawing an unusual amount from our endowment, good news for our long-term financial health.

FY 2021 Results

Income –

- We collected 97% of our budgeted income for Pledges.
- Despite being closed for most of the year, the Clothing Exchange contributed 100% of what they had committed.
- Facility use fees or Rentals were significantly below the budgeted amount at 42% because of the building being closed. The Waltham Day Care Center and the Chaplains on the Way Morning Program were the only occupants this year.
- Gifts and Offerings were also 66% of the budgeted amount, which includes contributions from the Thursday evening Buddhist Meditation Group. The virtual Sunday worship offering plate has not been as appealing as the actual plate passed during the service. The congregation also donated nearly \$5,000 this year to 11 local organizations in the “Share the Plate” program.
- Thanks to the generosity of members and friends, we exceeded our fundraising goal this year, raising \$8,615 or 108% of what was budgeted. Fundraising events this year included: 1) sale of First Parish face masks; 2) an online holiday marketplace; 3) an online one-man “A Christmas Carol” show; and 4) an online service auction with a talent show.

In addition to the use of PayPal for online payments, we added Venmo, thanks to Janet Riley and Leslie Gildersleeve.

Special thanks to Joel Weddig for spearheading the First Parish face mask project and Jane True for her design expertise; to Joan Smith, Leslie Gildersleeve, and the many donors and purchasers of items in the holiday marketplace; to Auction Committee members Amy Eastwood, Leslie Gildersleeve, Joan Smith, and Joel Weddig and all the members and friends who donated and purchased items and services in the online auction. Special thanks to Daphne Blount for organizing the talent show, as well as all the wonderful performers, and to Kimberly Strafford for serving as our emcee and Dan Strafford for handling all the zoom logistics. The talent show helped to make the evening a smashing success!

Expenses

Expenses in several areas were less than budgeted, primarily due to reduced use of the building and inability to hold programs and events except online. Painting the sanctuary was the next major property project on our list, so we chose to do that while the building was relatively unoccupied. That cost was \$24,200, without which, we would have ended the year with a small surplus. Overall, we had a budget deficit of \$23,266. Between a cumulative surplus (from several years of surpluses) of over \$28,000, and \$37,672 in Payroll Protection Program funding, we continue to maintain a reserve in case the building continues to be closed into FY 2022 and to handle other unforeseen circumstances.

FY 2022 Budget

The Finance Committee has developed and will present to the congregation for approval a budget that assumes normal operations in FY 2022, i.e. that the building will be occupied by the congregation and renters.

Personnel costs and property maintenance together account for 86% of the budget. Commission budgets represent about 9%. Our total budget for FY 2022 is \$309,256, a 0.6% increase over FY 2021. For non-endowment, non-pledge income, we are planning as follows: Rentals, \$50,000; Gifts and Offerings, \$10,000; Fundraising, \$8,000; Clothing Exchange, \$2,500; proceeds from the sale of an updated FPW History Book, \$1,650; an annual grant of \$900; together these add up to \$73,050. So, now we need to fund $\$309,256 - 73,050 = \$236,206$. The remaining income sources are pledges, endowment subsidy, and prior year surplus (we budget conservatively so cash tends to accumulate; we track the amount and use some portion of it in our budget each year). For FY 2022, these three items need to add up to \$236,206. In the budget presented to this year's annual meeting, the distribution proposed by the Finance Committee and agreed by the Board is as follows: Pledges, \$120,000; Endowment, \$113,000; Prior year surplus, \$3,206.

We have worked steadily over the last few years to reduce the reliance on our endowment for support of the operating budget to a more financially sustainable level. Best practice suggests we draw no more than 4-5% from our endowment each year. Our general budgeting philosophy is to maintain our building and strong programming while seeking to increase membership (up to 108 now) and thus (we hope) pledge income, and reduce the dollar amount of the endowment draw each year. Our FY 2022 total endowment draw (including both restricted and unrestricted funds) will be \$113,000, compared to \$114,000 for FY 2021, a reduction of \$1,000. The endowment total as of the end of the trustees' fiscal year (2/28/2021) was approximately \$2,385,000, so the FY 2022 endowment draw is the lowest ever at 4.7%. This is good news, but our challenge will be maintaining that sustainable level in the future.

This year Finance Committee members focused on getting through this pandemic fiscal year:

- We carefully tracked the impact of lost revenue and budgetary expenses, some of which have been less because we have used the building only minimally.
- We conducted our fundraising activities online and had great success, exceeding our budgeted goal, thanks to the congregation's support of the holiday marketplace and the online auction.
- We added the use of Venmo for payment of pledges, auction purchases, and other contributions.
- We conducted the pledge drive entirely online, delivering homemade cookies to thank early pledgers.

Members of the Finance Committee care deeply about the long-term financial health of First Parish all work well together. It has been a pleasure to be part of this group. We welcome interested community members to attend our meetings or otherwise get involved in First Parish finance activities.

Janet Riley – Treasurer
Leslie Gildersleeve – Assistant Treasurer
Joan Smith – Former Finance Commissioner
David Wilbourn, Joel Weddig, Barry Stearns – Trustees

Respectfully submitted,
Donna VanderClock
Finance Commissioner

Membership Integration Commission

The Membership Integration Commission is charged with a variety of responsibilities related to welcoming newcomers and creating opportunities for everyone to connect with each other.

This year is my second year as commissioner and as we all know, our church-life has been completely online this year. This has created many challenges to keeping connections with members and attracting new members. One of my focuses is always to think about how to integrate the young families into our weekly activities. This too has been hard to do. School has been online for most of the year and many families have carried a heavy burden of the balance of work and school. This year's committee members are Elisse Ghittelman, Marianne Cutter, Nancy Lawrence, Martha Gallagher, Cynthia Salamanis, Sue Genser, Gretchen Daggett and Roberta Trudeau.

The following are activities that the committee has worked on during the year:

Newcomers – The few visitors we have had at our services have been recorded in the weekly attendance. As visitors request access from Chris Johnson, their information is sent to Marianne Cutter and she makes the welcoming connections.

Breakfast Program – Working with Chaplains on the Way, Marianne Cutter and Plum Kennard created a support group to the new Breakfast Program that provided inside space and food for people who were experiencing homelessness. This group created a signup genius for food needs, wrote newsletter articles of other needs and communicated to the Board and other commissions. The Breakfast Program has now transitioned from five days a week to Tuesdays and Thursdays focusing on more leadership development and a spiritual space.

Care Team Support – Members of the Membership committee had supported the letterwriting and phone contact that began in March of 2020. This year, the committee continued to support the Care Team by checking in with Daphne Blount and being available for support as needed. Many members attended the meetings on Pastoral Care to lend their support.

Small Group Ministries – The Membership Committee had been a support to the creation of the two small groups and continues to be available for support as needed.

Birthday Cards – The committee developed a list of member's birthdays and posts them weekly in the newsletter. Martha Gallagher sends out a card to each member. The hope is that others celebrate these important days also.

8th Principle – After attending a UUA conference, New Day Rising, members of the committee were introduced to the 8th principle project. A power point was created and shared with the Board to consider a full congregation project.

Ferry Beach – Sadly again for the second year, the Ferry Beach trip has been cancelled. Sue Genser is continuing to communicate with them for plans for the coming year.

Summer Services – A subcommittee of the membership and worship committees worked together to develop online services during the summer of 2020 with visiting students and ministers. A plan has begun to create a few limited services with the recommendations of the COVID response team for the summer of 2021.

RE Sub-Committee – Due to the different needs of our young families and support for youth groups and their religious education programs, the Membership committee is working to create a subcommittee focused to support their programming. Previously, there was a commissioner to support this group but there has been no commissioner for a few years. This group will begin meeting over the summer to plan for the coming year.

Respectfully submitted
Pam Penton, Commissioner

Music and Worship Commission

This has been a year like no other! During a full year of the pandemic, our church building remained closed yet, our music and worship activities were active and thrived due to the dedication and hard work of many members and our staff.

Worshiping via Zoom video conferencing was a very different experience from being together at church. It was, however, a practical way for people to stay connected to each other and the church during the COVID-19 pandemic isolation. Services have been well attended with 45 to 50 participants each Sunday. Many lit chalice at home simultaneously. Small breakout groups after the morning message and during coffee hour provided good opportunities for people to talk to one another.

In addition to my work as Music and Worship Commissioner, I had the pleasure of organizing the Small Group Ministry program along with Andy LeCompte. I had the honor of serving on the Interim Minister Search Committee. I also enjoyed helping to keep our virtual coffee hour going as long as people wanted each Sunday.

Music and Worship – The Music and Worship Commissioner is charged with coordinating the non-ministerial activities involved in Sunday and special worship services, including assisting with music and worship initiatives and tasks.

Worship – The ministry focused on these shared theological themes: Renewal, Deep Listening, Healing, Stillness, Imagination, Beloved Community, Commitment, Becoming, and Story.

Rev. Marc was on sabbatical from June to September. Guest service leaders included: Regie O’Hare Gibson, Rev. George Oliver, Rev. Kelly Weisman Asprooth-Jackson and Rev. Rebecca Sheble-Hall.

Summer Services were planned and/or led by: Daphne Blount & Plum Kennard, Michael Carmody, Andy LeCompte & Brenda Asis, and Pam Penton. Summer Guest service leaders included: Rev. Mary Margaret Earl, Regie O’Hare Gibson, Rev. Rebecca Sheble-Hall, and ministerial interns: Alan Cantor and Carrie McEvoy.

Thanks to Emma Campbell, Michael Carmody, Sue Genser, Elisse Ghitelman, Charlie Kelly, Pam Penton, Janet Riley, Devin Shmueli, Joan Smith, Dan Taylor, Bill VanderClock, Donna VanderClock, and we were fortunate to have the technological help needed to keep members connected to First Parish as we continued to hold services in the cloud.

The congregation appreciated the video slide show that Devin Shmueli created for our Homecoming Service in September. In January, Rev Becky hosted a service with four stories by K.J. Robinson, John Breen, Pam Penton, and Elisse Ghitelman. The stories were about “how their lives have been altered by their faith and their connection to First Parish in this time of pandemic.”

The First Parish COVID-19 Response Team held a focus group in April to begin preparing for worship in the fall of 2021. We considered the potential for a hybrid church to “continues to nurture our current membership while welcoming people who cannot enter our Sanctuary doors.”

Worship Committee – The Worship Committee, under the new leadership of, Michael Carmody planned and led five member-led services. “A Pivotal Time” in November, “The Interdependent Web, our UU 7th Principle” in February, “Welcome Spring” in March, “A Dialog with Christianity” in May, and a Poetry Service in June.

Music – The board approved Emma’s participation in The Music Leadership Certification Program (MLCP) a three-year (four-years during the COVID-19 Pandemic) program that: “Summons music leaders to their calling of music ministry, enriches their service to Unitarian Universalist congregations, and enhances their professional perspective and skills.”

The Music Leadership Certification Program is administered by the Music Leadership Certification Committee (MLCC) of the Unitarian Universalist Association (UUA) in collaboration with the Association of Unitarian Universalist Music Ministries (AUUMM).

In November, the piano was moved from the sanctuary to Emma Campbells’ house to ensure that it was protected from cold temperatures and break it in after major repairs.

Guest Musicians – Guest Musicians included Trisha & Thara Iyer in July, the Waltham Philharmonic Orchestra Woodwind Quintet, Maria Jane Laoizou, Candace Burgess, Jane Salstein on flute and David Salstein on piano, Charlyn Bethal, (oboe, and Guy Urban (piano), Empty Hands Music, Nimo Patel and Daniel Nahmod (recording of Planting Seeds: A song of Life), Wiener Cello Ensemble (recording of Bolero).

In October we were treated to a new song “All I Really Need” written and performed by our own Scott Tougas!

Choir – Our heartfelt thanks Emma Campbell and our choir for their hard work, dedication and perseverance in learning new technology. As Reverend Marc said to the choir in in September: “Your singing adds a depth our virtual worship that is otherwise just not possible.”

In February, Emma and the choir performed a memorable Music Sunday with members of the choir singing five songs including a video of members of the congregation participating in church activities (before the pandemic). Another song “Well Done Today” was arranged by choir member Bill Weber.

In gratitude,
Brenda Asis
Commissioner

Property Commission

General Comments

Well, we made it through this crazy year and part of the side effects of the pandemic are that the building was little used. The Day Care did come back and used their space with no significant issues. The Chaplains on the Way sponsored a breakfast program which also proceeded well without a hitch and the Clothing Exchange opened for a few days. There were a few repairs & maintenance that needed to get done and we took advantage of the empty building to do some needed upgrades. Barry Stearns once again was the main

force that kept our property in the fine shape it is in. Many thanks to him. Leslie & Amy kept the grounds looking great and Jan Bernsee, Chris & Bec Taylor helped with snow shoveling.

Activities Over the Past Year

Parking Lots – In June the upper parking lot was completely paved anew, and the lower lot was resurfaced. Barry & I learned how to add the stripes, so we have well defined parking spaces now. Hopefully we'll be able to put them to use on a Sunday morning before too long!

New Fence – In September we replaced the fence at the north end of the lower parking lot, putting in a gate (locked) to get to the side of the church along Whitcomb Hall. We've just recently added privacy tape and have taken other measures to reduce trash and dust blowing down onto our neighbors.

Heating/Plumbing – There were a couple of small hiccups in our gas forced hot water heating system, but our plumber came and fixed that. The plumbers also performed some minor repairs in the kitchen.

Piano – Because it would have been prohibitive to heat and humidify the church to keep the newly repaired piano in good condition, we had the piano moved to our music director Emma's home for the winter and plan to move it back for next year assuming we are back in the church.

Sanctuary – Hey, while no one's in it, isn't that a good time to paint the Sanctuary? Yes, indeed it is - so we had that done and what a difference. It looked so good that now we're going to neaten up some of the flooring as well. Barry Stearns, Dan DeHainaut, Bill VanderClock, and I finally answered the question "How many UU's does it take to screw in a light bulb?" Evidently four, as we replaced every bulb in the Sanctuary chandeliers with energy efficient LED's, 72 of them in total. The Sanctuary should be in fine shape for whenever we can back in there. The painters did manage to trip one of our fire alarm electric eyes, but they paid the cost of having it reset.

Grounds: Leslie & Amy Eastwood kept our grounds in excellent condition.

Barry & I took down four small trees in the little strip along the North side of Whitcomb Hall. Larger trees in this area could represent dangers to the cars in the neighborhood below so it is better to remove any trees before they get very big.

Miscellaneous

- Barry was our representative and negotiator to find us a new property insurance provider and the policy is in place.
- Barry also was our point person in dealing with the trash removal company that has trouble keeping their records straight.
- Our fire alarm system was inspected and passed.
- The City of Waltham came out to fix our water meter.
- The City of Waltham broke and then repaired a piece of the fence around our Triangle.
- New blinds were put in the Parlor and Harrington Room.
- The outside door to Whitcomb Hall was repaired and strengthened and the railing on the stairs up to the outside door was replaced.
- Windstorms took down some trees, played havoc with our BLM banner, and took out a piece of our aluminum siding.
- The outside door to the Choir room was re-glazed (and will be repainted)
- The lawn mower was tuned up and readied for the new lawn mowing season.

IT Committee - Ongoing Projects, September 2020

- Creating FPW YouTube channel which would allow for the live-streaming our services on YouTube if it is decided that this would be useful.
- Migration Project: we've completed documentation for transferring documents into our Shared Drives; Creating documentation for
 - Creating documentation for file transfer to shared drives
 - Setting up/logging into new @ walthamuu.org accounts
 - Using Chrome Profiles to simplify dealing with multiple simultaneous Google accounts
 - Virtual Service support - creating a pre-service checklist for tech volunteers
 - The Jones Committee, was the pilot for our Migration project and have received their new accounts;
- Choir: Looked at tools for simplifying Virtual Choir performances and other IT tools to help maintain and distribute music;
- Created public website for IT Committee to share information with the congregation: [IT Help Center](#) (This is a Site, which is a Google product that comes with our Workspace account. Hopefully, once everyone sees how easy it is to make a Site, every committee will have their own, and there will be joy in the land);
- Security Cameras:
 - Looked into setting up outdoor security cameras
 - Studied where and how to set up cameras;
 - Submitted equipment recommendation for a system that can email someone if questionable activity is noted.
 - Another committee will come up with a policy regarding notification and access of the camera feeds, but we can set them up
- Due to overlapping wifi zones, there was some difficulty getting good connections in the Harrington room, so Bill V created a second wifi server (Church2) specifically for use in the Chapel and Harrington room. This should improve connectivity.

Upcoming Activities/Issues

- Floors in sanctuary will be refinished. Choir room door will be painted. We will be testing out a security camera. If we like it, we may increase the coverage.
- We will be looking into ways of keeping an electronic connection to our services even when we are back to church in person.

Dan Taylor
Property Commissioner

Social Action and Outreach Commission

I was asked to take over this Commission in the summer of 2020, after the previous Commissioner, Candace Holman, resigned.

Please note: when I speak of “meetings”, they were all on Zoom. The COVID-19 pandemic had forced the closing of the church in March of 2020.

In June 2020 a “Black Lives Matter” banner was hung on the First Parish portico.

My first task as Commissioner was to join with the folks who volunteered to be a Transition Team for me: Deb Jose, Nancy Lawrence, Andy LeCompte, Dimitry Zarkh & Elisse Ghitelman, facilitated by Devin Shmueli, to write our website’s statement speaking to our commitment to the Black Lives Matter movement.

First Parish in Waltham, Unitarian Universalist overwhelmingly supports the Black Lives Matter movement.

With the horrific murder of George Floyd, as well as the murders of so many others of our Black siblings at the hands of police, we were awakened to the evidence of calculated and systemic oppression, brutality, unjust imprisonment and racist policies against Black people in America.

To honor the memory of the late Civil Rights activist and Congressman John Lewis, who said: “When you see something that is not right, not fair, not just, you have to speak up. You have to say something; you have to do something.”, we strive to live up to our Unitarian Universalist principles by joining with the voices that call out injustice and by working together to build a country we can be proud of.

To this end:

We are dedicated to exposing our racist patterns.

We acknowledge it is our job to educate ourselves and to devote ourselves to action.

We will bear witness against the evils of our society.

We pledge to challenge the embedded white supremacist world view which has gone unquestioned.

We recognize our material abundance & privileges come at a cost to people of color.

We commit our support, resources, compassion, openness & love to the Black community.

We realize no matter how good our intentions are, only the impact of what we do matters.

We welcome feedback from the Black community, whatever form it takes.

In October of 2020, our Community Minister, Rev. Becky Sheble-Hall, came to a regular Social Action Team meeting asking for support in her other role as Executive Director of Chaplains On The Way (COTW) to establish a morning program in Whitcomb Hall for our unhoused community. She could have chosen any number of other churches or venues, but she hoped this would be a cause First Parish could get behind, and we did. It all went very quickly. Rev. Becky came up with excellent safety protocols; she sought & received approval from the Waltham Board of Health. The program was approved by the COVID Response Team & then by the Board of Managers. Pam Penton set up a “Signup Genius” link for folks, not just First Parish Members, to volunteer to cook & provide ground coffee fruit, breads etc.

On November 11, 2020 this remarkable & loving program began. Five days a week our unhoused friends came for a delicious hot breakfast served on china plates; hot coffee, or tea, just the way they liked it; fresh fruit & juices; bagels & muffins. Our bathrooms, a real necessity when nearly every public bathroom in Waltham was closed because of COVID-19, were a true blessing. All of this took place in our warm & comfortable church hall. Of course Rev. Becky was there to speak with our guests & to give counsel. Not one guest or volunteer contracted the COVID-19 virus.

We should be very proud of our church members who provided food & service with such generosity & love. The Morning Hours program engendered a great response from the Waltham community as well. COTW was not charged rent and, additionally, was offered a subsidy for the utility bills. However, they

had a successful fundraising campaign & paid all those bills themselves.

In mid-April, 2021 the Morning Hours program ended. It has now morphed into just Tuesdays & Thursdays from 8:00-11:00, including cleanup. Breakfast is a small part of the program which is mainly focused on leadership & worship services. COTW is now renting Whitcomb Hall from First Parish.

Pam Penton set up a new Signup Genius for volunteers who'd like to provide the food.

We will see what the future brings for the COTW program at our church. No decisions have been made yet as to when the church building will reopen.

A group of First Parish SAT members: Candace Holman, Elisse Ghitelman, Dimitry Zarkh, Roberta Walz & Nancy Lawrence, with support from Devin Shmueli, formed the group "WALT" (We Are Anti-racists Learning Together). They've worked very hard at weekly meetings for months to design a curriculum using the UUA materials "Examining Whiteness" as a starting point. They've given two excellent workshops & have drawn interest from a number of First Parish Members. Each session has had two dates/times for people to attend. The final session for this year will be: June 6th at 1:30 and June 8th at 7:00.

The study group, Equity & Justice for All, has been meeting every month to discuss books we've read. A couple examples are:

- *White Fragility*, by Robin DiAngelo
- *You'll Never Believe What Happened to Lacey: Crazy Stories About Racism*, by Amber Ruffin & Lacey Lamar.

Discussions have been lively.

The SAT has been meeting regularly with monthly discussions of relevant topics.

Through Devin Shmueli, the SAT and the DCE set up a connection with Stephanie Seales, founder and president of "Ase Narratives". She's a brilliant & kind person who does racial justice counseling. We had room for 25 First Parish members & about half that many took part. Participants attended three sessions: May 2, May 16 & May 23, 4 - 5:30. The consensus seemed to be 1) Wow 2) Thank you! 3) More! We hope to work with her again next year when, hopefully, we can draw a larger group. www.asenarratives.com

In 2020 - 2021 we were NOT able to:

- Collect Christmas gifts for the Giving Tree 2020; they took online donations of money only.
- Hold any Waltham Connect events in 2020 or 2021.
- Cook together and host the COTW Annual Christmas Eve dinner which we shared with our unhoused friends.

In spite of all that the COVID-19 pandemic has robbed us of, we have stayed connected. We've continued to follow our commitments to each other and to our community at large.

Plum Kennard
Social Action Commissioner

COMMITTEE CHAIR REPORTS

COVID Response Team

Our team was formed in March 2020 to help coordinate and inform our church's responses to the pandemic. Our priority was and continues to be the safety of members, staff, renters, and the community at large. At the same time, we are committed to nurturing the interpersonal and spiritual connections that are the life of our church. Wisely balancing both these commitments is our ongoing challenge as we serve to advise the Board of Managers.

The Response Team comprised members of various segments of the church community including Dan DeHainaut, Muffy Young, Scott Tougas, Christopher Johnson, Devin Schmueli, Daphne Blount, and Rev. Marc. Members were chosen based on their experience in the church, medical background, and current role in the church. As time passed, Scott Tougas, stepped off the committee while Carla Hillyard and Barry Stearns stepped on.

We have met regularly since March 2020 to review the status of the pandemic in Waltham and neighboring communities and the evolving understanding of scientists, health care providers, and public health experts. While our work has been anchored by the recommendations of the federal Centers for Disease Control and Prevention, the Massachusetts Department of Public Health, the Waltham Board of Education, and the Unitarian Universalist Association, we have always viewed First Parish as a unique community with its own strengths and vulnerabilities.

As September approached, the team began receiving requests about opening the building for specific purposes, and by mid-September the Response Team had formulated a "Building Use and In-Person Gathering Recommendation" for the Board to consider. The key recommendation to the Board was that the church should open its doors to essential services only. The Board accepted our recommendation. Throughout the fall into winter, proposals for use of the building trickled in. Here are the main proposals sent to the Response Team this year. All proposals were ultimately approved by the Board.

- The Clothing Exchange proposed opening for a few days in October.
- Rev. Becky proposed hosting a breakfast program in Whitcomb Hall (staffed by Chaplains on the Way and church volunteers) to serve breakfast to people experiencing homelessness.
- Donna VanderClock proposed having a small crew work in the church kitchen to assemble and distribute 30 meals (sold as part of the FPW Service Auction Fundraiser). Folks would drive through the lower parking lot to pick up their meals.
- Sue Genser proposed bringing members (in need of technical assistance) into the Harrington Room on Sunday mornings to view our worship services on the big screen.
- Pam Penton proposed holding four summer worship services.
- Guidelines are awaiting Board approval for renters and in person gatherings.

Now, as more and more people are vaccinated the pandemic landscape continues to change. Our most recent recommendation was for the Board to appoint a new team to steer the process of reopening the church to worship. The Board agreed and created the "Reopening Team" at its May meeting. This will be an 'inter-talented' team whose members represent many constituencies within the church. They will be meeting over the summer to determine the steps that will safely lead the congregation back to church.

Our research and the workshops hosted by the UUA about returning to church all underscore the idea that there will be no one size fits all solution to our return, and that rather than trying to devise a master plan,

the more prudent approach will be to implement small successful steps which will provide us with some latitude for course corrections if necessary.

Thank you for continued trust in our efforts to keep us all safe and connected.

Respectfully submitted,
The COVID-19 Response Team

Jones Partnership Committee

The Jones Partnership Fund received \$35,000 from the Ted and Natalie Jones Account for distribution to 17 non-profit organizations. The Jones Committee consists of five members: Jane True, Joan Bone, Peter Babi, Marianne Cutter, and Jim Ohm. The guest grant application readers this cycle were Leslie Gildersleeve, and Carla Hillyard. We are also grateful to our church member sponsors who provide the necessary bridge between First Parish and each organization.

The committee evaluated the grant applications in February and March and recommended near full funding to all organizations to the First Parish Board of Managers. The full church vote to approve was in May and it was unanimous.

The average amount given was \$2,000, but funding ranged from \$550 (on the low end) to \$5,000 (the most given). The Waltham Land Trust received full funding at \$550.

The committee anticipates more applications next year as activities and events return to normal. We are also exploring ideas to unite and promote the non-profit organizations in Waltham - a city wide event that brings together this community. We are considering Spring 2022 and will communicate with our church membership as plans take shape.

Jim Ohm, Chair

Nominating Committee

The First Parish Nominating Committee has met throughout the church year to fill positions of expired terms. Please see the slate on the last page of this report for a complete list of people who have offered to serve. A huge thank you to everyone!

Since the election a year ago, we've seen some changes in our own committee. Plum Kennard filled a vacated position on the Board of Managers, leaving an empty position on the nominating committee. Ace Gullotti to the rescue! Then Gary Morrison was unable continue with his term, and Martha Gallagher kindly stepped in. These changes were approved by the board per the bylaws.

Gary Madison is leaving the committee after three two-year terms. Thank you for your service, Gary! Jacob Allen has agreed to step into the vacated slot, and Joyce Wilbourn and Ace Gullotti have each agreed to continue for another term.

Respectfully submitted,
Bee Fortin
Martha Gallagher
Jim Griffeth
Ace Gullotti
Gary Madison
Joyce Wilbourn
Dan Taylor, Board Representative

Personnel Committee

Our work in support of our committee charge included the following:

1. **Staff performance appraisals:** We monitored the performance review schedule, checking in with Rev. Marc to ensure that reviews were taking place.
2. **Develop salary recommendations:** As in the past, our compensation recommendations were developed using the UUA's guidelines for a small church (< 150 members) in Geographical Index 5. Our recommendations were passed to the Finance Committee prior to presenting as part of the annual budgeting process.

As part of these recommendations, we acknowledged that Rev Becky Sheble-Hall has now reached full fellowship and included a salary for her that falls within the UUA guidelines for a 10 hour per week ministerial position.
3. **Maintain and revise as needed job descriptions** for all non-ministerial staff.
 - a. In early December, Director of Community Engagement Devin Shmueli submitted his resignation, indicating that he had accepted an offer at another congregation. We revised the DCE job description to an Acting position and made changes to accommodate reduction in hours and other changes due to offsite programming due to the pandemic.
 - b. In order to formalize the 10-hour Community Minister position that Rev. Becky Sheble-Hall currently holds, we have created a job description for that position. As of late May, minor modifications to clarify responsibilities are underway.
4. **Review personnel policies and procedures** in the areas of salary, fringe benefits and terms of employment and revise as necessary; present recommendations to the Finance Committee and Board of Managers. We have not yet completed this review, though the guidelines continue to be a useful reference.
5. **Provide one or more Personnel Committee members for any Search Committee** created to hire staff. Assist in interviewing and making recommendations to the Board of Managers. We coordinated the hiring of two key FPW staff:
 - a. In December, we created a search committee to hire a new DCE following Devin Shmueli's announcement that he was resigning his position. A new recruiting process was underway when Devin contacted us to request that he be considered again for the position. We were pleased to offer him the newly updated Acting DCE position. He accepted and returned to FPW in late January.

To Music and Choir Director Emma Campbell, Groundskeeper Richard Farina, Office Manager Chris Johnson, Director of Community Engagement Devin Shmueli, and Rev. Rebecca Sheble-Hall: we're grateful for your continued creativity and dedication during the devastating pandemic crisis, and look forward to days ahead when we can all be together in person again. We also look forward to welcoming Interim Minister Rev. Frieda Gillespie in August.

A special note to Rev. Marc: we will miss your leadership and your spirit of dedication and concern for everything that comprises First Parish in Waltham, but the Personnel Committee also has special insight that allows us to see your concern for the wellbeing of the wonderful staff at First Parish. You have built a great team, and you will be missed.

Respectfully submitted,
Martha Creedon, Chair
Donna VanderClock

Worship Committee

Member-led Services are an important ministry that allows members and friends of First Parish Waltham to share perspectives of folks usually on the other side of the pulpit and lectern. In 2020 and 2021, our Worship Committee dived into the sensitive but pressing topics of politics and religion; subjects one wisely avoids in social gatherings. We could have made it easier on ourselves, but our committee felt it was important to confront these important though difficult themes.

In my first year as Chair of the committee, I followed Marty Ahren's example of patient persistence in facilitating consensus on writings and other elements of a service. I am grateful for her continued help. As well, our core of regular committee members and contributors through this past year made these services come alive. I am very thankful for the collaborative teamwork of Marty, Gretchen Daggett, Sue Genser, Karen Klein, and Gary Madison and for their wisdom, creativity, and vision.

At the end of scheduled services in June 2020, it was clear that services need to continue in order for congregants to remain connected during the isolation in the early months of the pandemic. The Worship Committee contributed, but it was mainly the organizing efforts of Pam Penton and Brenda Asis that enabled a seamless continuation of Sunday Services through July and August. If I only had their energy...

Our retreat in August planned themes for the upcoming church year and looked forward with trepidation to our first service scheduled days before the national election. We wanted to provide our fully formed service on climate change (cancelled at the start of the pandemic), but felt we had to address our concerns about the future of the U.S. and our democracy. During the service we asked "what if" we could create a just world, confronted the checkered history of our Republic, and appealed to the better angels of our nature with American songs of hope and struggle.

The Winter Solstice Celebration was the first on Zoom, and for the first time, we asked participants to assemble traditional altars of earth, air, fire, and water at home. We honored this ancient tradition with rituals of drumming and chants mixed with music and of course Bill Weber's tones of the harp. In February, with the health of the planet still in our thoughts, we explored the UU Seventh Principle: Respect for the interdependent web of all existence of which we are a part. We spoke of humans' relationship with the planet, of reverence for life, environmental activism, and the modern web of interconnectivity through internet applications.

March 21 marked the beginning of Spring and one year of remote services. We welcomed the season with poetry, song and to our delight, our Friendship Finders led by Pam Penton reading the book, *Sun Bread*. I wrote and sang a song for the occasion titled, *We All Agree (That We Should Sing)*.

May's service, *A Dialogue with Christianity*, was our most difficult service to prepare in my experience with the committee. Five members with very different views and interpretations worked hard to find common ground and a way to talk frankly about Jesus and Christianity from historical and personal perspectives. Alan Bone joined us to share a unique view as a former minister of a Disciples of Christ church who became a Unitarian-Universalist.

At this writing, planning for the annual Poetry Service June 6 is nearly complete. Plum Kennard and Alan Bone will join members of the committee to read poems and Bill Weber and John Allen will provide some unique music.

Many hands make light work of services by videoconferencing. What seems common now was brand new for all of us in March 2020. When they knew they were needed, staff and members stepped up to become Tech. Support; the heroes that made remote services possible. They consulted and instructed the Worship Committee to help us help them in providing all the elements that make a service. Members make member-

led services, and to those members who contributed this past year, our committee is truly grateful. It has been a privilege to serve and to work with all who helped us bring new voices and perspectives to our lay-led services. Members, please join us in church year 2022, for a reading, for a song, for a year or maybe more. The work and the joy continue, and to quote Todd Rundgren, “The dream goes on forever.”

With love and joy to all
Michael Carmody
Worship Committee Chair

Music Committee

Once we return to the church building, the plan is to resume discussions about re-forming a Music Committee to assist with our shared music ministry. The purpose of the committee is to support and assist the Music & Choir director, Minister, and Music & Worship Commissioner in the ongoing development of a robust and comprehensive music ministry. The committee will also assist the Music Director and Board of Managers to set long-term goals.

In gratitude,
Brenda Asis
Music & Worship Commissioner

Small Group Ministry

First Parish started Small Group Ministries (SGM) in May of 2020, as a new way for us to stay connected and was especially needed as we faced a global pandemic that limited our physical contact with one another. I volunteered to coordinate the SGM program. Andy LeCompte and I each facilitate one of the two groups. Andy has provided the Zoom account and assisted with technology for both groups. We met with Rev. Marc periodically to discuss the groups’ progress.

The SGMs are intended to serve people in a different way than our standard ways of operating our churches. The idea is to provide inspiration and intimacy. This new-to-us way of serving has roots deep in history and our Unitarian Universalist heritage.

The Small Group Ministry groups have consisted of two groups of 9 to 10 people. Each group has met twice monthly for 90 minutes over the past year. The groups have allowed members to get to know each other and to explore significant questions involving spirituality and the business of living.

The Sunday group decided to meet monthly in person in June and July and skip August. Conversely, the Monday night group voted to continue meeting via Zoom twice per month in June, July and August with a later and shorter time (7:30 to 8:30).

Recently we have had some transition within the Sunday group. Two people decided to leave the group; two people are taking the summer off and might return in the fall. We expect that we will be adding group members in the fall.

Arts & Crafts Interest-Directed Small Group Ministry – We expanded the Small Group Ministries in November to include an interest-directed group, the Arts and Crafts group. This group is focused on knitting, sewing, drawing, and other crafts. The purpose of the group is to work together, inspire one another, share projects that participants are working on, and/or ask for ideas or tips. Nancy Lawrence and Muffy Young helped get the group started and Plum Kennard volunteered to send out the Zoom link to the group each week. The group meets each Monday with an informal format. Attendance averages about 5 people each week.

Basic Elements of Small Group Ministry – Excerpted from *The Complete Guide to Small Group Ministry: Saving the World Ten at a Time* by UUA minister and executive Robert L. Hill

Small Group Ministry is intentional member led small groups that deepen and expand the ministry of the congregation.

Small means a group with a maximum of 7-10 people. Groups of this size provide an opportunity to relate on a more intentional level.

Group is a gathering of individuals, sometimes selected at random, sometimes selected for a specific interest or characteristic. These groups meet over a period of time.

Ministry is the process or act of caring or being present with another. This relates to the spiritual as well as the physical and emotional well-being of the group participants.

The Power and Promise of Small Group Ministry are Intimacy, “Ultimacy” and Growth.

Intimacy is increased depth of relationship that comes from meeting over time, willingness and ability to listen without comment or advice, to learn from others, and to share from the soul.

Ultimacy focuses on meaning and significance, rather than details, information or outcome.

Growth: Small Group Ministry provides opportunities for members to develop skills and grow in confidence as leaders within and beyond the group, and the potential to grow churches in numbers, and in generosity, cooperation, and sense of well-being. This growth occurs when people feel supported.

Three agreements between the groups and the congregation as a whole are suggested:

- To abide by a set of relationship ground rules, called a covenant. This includes ways to listen and to be heard.
- To welcome new members to the group or to the program overall, keeping the groups open to new people and new ideas.
- To engage in service to the congregation and larger world. This helps the group deepen its internal relationships, increases the connection with the congregation, and gives from the abundance of the group experience.

Leadership has two functions which can be done by one person or shared: The Group Leaders are chosen and trained by the minister(s) and/or designated lay leadership (Small Group Ministry Coordinator) as part of shared ministry in the congregation. Group Leaders meet with the minister and Coordinator for spiritual support, enhancing group development, and awareness of new resources. Each meeting of the group is led by the Session Facilitator who follows the Small Group Ministry model. The Session Facilitator may be the same person each meeting or rotated within the group.

The **Session Plan** is a guide and a springboard for discussion. The Standard Format includes:

- An opening reading that introduces but does not guide the topic.
- A check-in during which each person briefly shares about such questions as, "What's most on your mind today?" or "How is it with your spirit today?"
- A time for the focus or theme of the meeting with sharing from personal stories, guided by questions in the Session Plan, and learning from listening to others, rather than wanting others to agree with a perspective.

- The check-out gives opportunity for each participant to say how the session was for him/her.
- A closing reading.

Respectfully submitted,
Brenda Asis
Small Group Ministry Coordinator

AUXILIARY ORGANIZATIONS

Clothing Exchange

Fundraising (Messed Up by COVID-19)

As we said in last year's report, we had hopes to resume our Spring 2020 Season in September 2020. Due to COVID-19 concerns, we were limited to six openings (Tuesdays and Saturdays) in October. Inside sales were strictly limited. Thanks to the handicap ramp, we were able to move most clothes racks outside and set up tables for the other items. Two canopies were used, one we purchased and another that was loaned. The weather was good for most of the sale days. Unfortunately, the attendance was way below normal.

The Waltham Clothing Exchange then closed and waited for fair weather to re-open similarly. This we did in May conducting our Spring 2020 Half-Price and Closing Sales over two Saturdays and a Tuesday.

The exchange pledged \$4500 to the First Parish budget the year ending May 31, 2021 and it was paid. However, with the greatly reduced sales, we need to reduce our pledge to First Parish to \$2500 for the new budget.

Besides purchasing COVID-19 related materials, we did pay for the replacement of some more floor tiles in our rooms and the corridor.

We are very hopeful that we can reopen for our 64th year on September 14, with a return to our normal operating hours of 10-4:30 on Tuesdays and special Saturday openings in the Fall and Spring (looking for yard sale shoppers!)

When you see our notices that we are reopening, please help us share our existence with the rest of Waltham via all forms of communication you are familiar with! (We don't do Facebook, Tweet, etc)

Community Outreach

In the normal past, about 100 to 150 customers visit the Exchange each Tuesday and we have about 80 consignors. Some of our customers buy shoes, clothes, and bedding to send to their home countries, including Uganda, Guatemala, Honduras, and Haiti. In the past, after our clearance sales, most leftover items were given to St. Mary's for their free clothes and housewares program. Unfortunately, the program leaders are not healthy at this time, so we were lucky to encounter Waltham Mutual Aid, a new group reaching out to people with all sorts of needs. They are having a community fair on June 12 at St Marys and are taking our leftovers to distribute at that event. Leftover books are given to More than Words.

Our Volunteers

During the uncertainties of the COVID-19 Pandemic, our volunteers made their own decisions on whether, when, and how they would help. Accommodations were made. None of how volunteers suffered COVID-19 symptoms, all suffered missing the social interaction the Waltham Clothing Exchange provides for them.

Church members who help out weekly include Joan and Alan Bone, Amy Eastwood, Leslie Gildersleeve, Roberta Trudeau, Martha Gallagher, and Joyce Wilbourn.

We also have a great appreciation for our non-church volunteers: Susan Burkart, Lodia Bourgeois, Helen Mandile, Dottie Shaw, Marie Alesse, Elaine Ridentli, Claudia Canepari and Angie Emberley.

UU Principles

Community folks of all ethnic, religious, life status and economic backgrounds come to the Waltham Clothing Exchange. It is a melting pot recognizing the individual's inherent worth and dignity and the diverse nature of Waltham.

We are also following the principle of taking care of the earth. Our consignors and people who donate articles to sell are clearing out clutter for others to find as treasures. It's amazing how many times you can find something you have just realized you need and there it is at the Clothing Exchange. Also, as we hate to see so many things discarded on garbage pickup days, some of our best buys are discards!

Waltham Clothing Exchange plans to open for the 64th season on Tuesday, September 14 at 10 am. Thank you for your generous donations. They really help our bottom line. We invite you all to participate as customers, consignors, and volunteers too.

Respectfully Submitted,
Joel and Susan Weddig
Co-Directors

Acacia in Kenya

Acacia in Kenya partners with community leaders in Mumias, Kenya as they care for and educate young women at St. Elizabeth Lureko Girls Secondary School. The school provides a high school education and meals for several hundred students, approximately half of which board in two on-site dormitories. Acacia in Kenya is a stand-alone 501(c)(3) organization while remaining an official outreach program of First Parish (since 2006).

Acacia in Kenya Meetings & Membership – We hold quarterly meetings, with the formal annual meeting held in the fall. In 2020, we convened the annual meeting by telephone conference and all Board Members were present. No new members were added to the Board this past year, but we would love to have someone from First Parish Waltham join or be a liaison to the Board.

Mission – Acacia in Kenya's mission is to work with the Mumias community to create opportunities for young women through education, with the goal of empowering them to improve their lives and by extension, the lives of their families and communities. The mission is driven by local leaders identifying obstacles that the young women face and the resources or leverage needed to remove or mitigate those obstacles. Over the years, solutions to identified obstacles have included the school's manufacture of their own feminine hygiene supplies, the building of dormitories, and the development of a farm and workshops for community farmers. Acacia in Kenya's fundraising and additional practical efforts have contributed greatly to the St. Elizabeth Lureko Girls Secondary School becoming a stable and nearly self-sustaining hub of the community.

In 2020, catastrophic weather events and the COVID-19 pandemic became two additional and devastating obstacles, arriving simultaneously in March-April 2020. The effect of these catastrophes is impossible to overstate. Excessive rainfall led to massive flooding and landslides during those months; Kenya was particularly hard hit, with homes destroyed and family farms entirely washed away along with livestock and crops. With the imposition of crucial but financially crippling pandemic lockdowns, many families also lost daily-wage sources of income. By May 2020, more than 30 Mumias families were living in St. Elizabeth Lureko Girls Secondary School classrooms, having nowhere else to go, while food shortages and income loss exacerbated another crisis: hunger. Acacia in Kenya Project Coordinator Noel Lutomia concurred with International Grail Movement leader Marian Schwab in her assessment of this multiple disaster as “a crisis on top of a crisis.”

To respond to the emergencies affecting Mumias in 2020, Acacia in Kenya's primary fundraising goals shifted to providing food and COVID-19 prevention education and supplies. Due to the ongoing impact of community recovery and new variants of the coronavirus in Kenya, AIK's 2021–2022 budget is not yet solidified and may change more than once over the course of the year ahead.

2020–2021 Accomplishments

As was the case worldwide, the COVID-19 pandemic dramatically curtailed or cancelled numerous Acacia in Kenya outreach activities and workshops. Nevertheless, despite pandemic lockdowns and other crises affecting them, AIK-sponsored students continued and in several cases completed their current level of education. In all, **AIK funding provided financial support for:**

COVID-19 Pandemic Mitigation

- COVID-19 transmission-prevention supplies; education workshops; Care Packages for St. Elizabeth Lureko Girls Secondary School students and their families, including food and toiletries, and coordination with local leaders and community health workers
- In partnership with [International Women's Convocation](#), raised emergency funding for COVID-19 prevention and relief, helping students manage the disruption of suddenly being out of school, and to assist 45 flood-displaced families in coping with the recovery process: [see here](#).
- Support for sponsored students studying at home to keep them on track and support readiness for the eventual return to school
- Continued support for sexual and reproductive health rights education, and IWC-partnered programs on preventing teenage pregnancies and early marriage
- Support for local farmers to model sustainable, organic agriculture with teaching workshops on soil restoration and value-added agriculture
- Pursued partnerships with local and allied organizations to improve food security, education, and health and hygiene programs

AIK-Sponsored Students, high school seniors and postsecondary:

- 5 high school students: the final group of AIK-sponsored secondary school students—Cynthia Osundwa, Sheila Ndubi Osundwa, Valexine Nechesa, Rahma Mulisya, and Zubeda Waziri—all cleared their high school education requirements with high marks and plan to attend university in the fall. Acacia in Kenya offers these students sincerest *Congratulations!* and best wishes for the next step of their education endeavors. (We are now seeking sponsors for their postsecondary education.)
- 6 university students: one who is finishing up her final year, two in their 3rd year of school, and 3 in their freshmen year. All universities were closed for the pandemic lockdown last year, so students studied at home.

Vocational College of St. Elizabeth Lureko Girls Secondary School— poultry were acquired as a new animal husbandry program

International Women's Convocation Partnership – Noel Lutomia, AIK Project Coordinator, made presentations on Women's Leadership Training at the UN Commission on the Status of Women conference hosted by the [International Women's Convocation](#) (March 2021), and at the 2020 IWC Annual Meeting. **See also IWC Partnership in Pandemic Mitigation above.**

Menstrual Hygiene Management Education – Marked Menstrual Hygiene Management Day 2021, May 28th at Matawa Polytechnic, Mumias

Participation in International Day of the Girl Child, October 2020 – St. Elizabeth Lureko Girls Secondary School collaborated with local youth on motivational talks on the importance of returning to school when the government reopens schools; distributed sanitary towels to 100 girls.

Participation in International Women’s Day, March 2021 – Marked International Women’s Day 2021 on March 8th with women leaders in Mumias, focusing on policies and legislation supporting gender equality in Kenya.

Current Major Priorities and 2021–2022 Objectives

Annual objectives always include consistent promotion of AIK’s mission and goals to retain current donors and acquire new donors and contributors. In 2020 and the first half of 2021, assisting Mumias students and their families through the perfect storm of catastrophic events consumed fundraising, practical, and support efforts. Going forward, as the pandemic’s impact allows, priorities for the next year include:

- AIK Project Coordinator Noel Lutomia will make a presentation on Girls’ Sexual and Reproductive Health and Rights to the 2021 IWC Annual Meeting on June 15th.
- **Capital Project: Major Supplies Donation** – This project will provide a shipping a container fully stocked with 2 types of supplies to Mumias. One half of the supplies will be medical supplies for a clinic/hospital—for these supplies, we are partnering with <https://www.partnersforworldhealth.org/>. The other half of the supplies will be musical instruments and equipment for our sister organization [Global Youth Groove](#), and supplies for Acacia in Kenya local partners. The fundraising goal for the shipping container, purchase of supplies, and shipping logistics is \$45,000.
- Fundraisers – Indoor yard sale and online sale for four weekends, two in July and two in August in Rockport Maine and online. These sales are fundraisers for the Shipping Container Project and to raise awareness about Acacia in Kenya. Confirmed sale dates TBD. **Note to First Parish friends:** If you have items to donate, please contact Joyce at JoyceInKenya@yahoo.com for pick-up or delivery location details.
- Dedicated fundraising for university tuition for AIK-sponsored students
- Ongoing fundraising for everyday necessities, toiletries, appropriate clothing, high school supplies, and vocational college supplies such as small farm tools and gardening and work gloves
- Two visits to Kenya in 2022 – spring/summer and then fall, when we hope the IWC will be holding their meeting in Western Kenya. If you are interested in traveling with us, please contact Joyce at JoyceInKenya@yahoo.com,

At this time, Acacia in Kenya is pleased and grateful to commend Projector Coordinator Noel Lutomia (known to family and friends as Linda) for her extraordinarily swift response to the COVID-19 crisis. Working with her team in Mumias and her brother, Acacia in Kenya co-founder Sam Lutomia here in the U.S., Noel developed COVID-19 prevention education and resources almost overnight. In a petition for Acacia in Kenya funds for COVID-19 prevention efforts, Noel told us:

“With \$2500 we will be able to:

1. Reach 200 girls with sanitary pads
2. Supply 200 families with an average of 6 members with tapped buckets and soap
3. Sew 200 masks to distribute to the elderly and the disabled
4. Make 100 liters of refill soap
5. Transport and distribute the materials which we will buy in Bungoma and Nairobi respectively
6. Sensitize and train community members on how to wash hands, wear masks, physical and social distancing, and emphasis on government recommendations to flatten the curve and reduce infections.”

Noel’s leadership and expertly informed plan shows the enormous power of a very modest sum of funding from Acacia in Kenya, and we appreciate her and our Mumias partners for leading and implementing these

efforts so successfully. Acacia in Kenya may be a small organization, but we have dedicated, effective leadership in our local partners in Kenya and a reliable donor base here in the U.S. We make a big difference.

Please visit the [Acacia in Kenya Facebook page](#) for photos and a video on the COVID-19 response, a detailed travelogue of AIK members' visit to Kenya in 2019, descriptions and videos of the St. Elizabeth Lureko Girls' High School's students, classes, activities, and events, and more information about AIK's mission and accomplishments: www.facebook.com/acaciainkenya.org.

FINANCIAL and REFERENCE DOCUMENTS

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Treasurer's Report

First Parish in Waltham, Budget History and Proposed Budget 2021-22

Donna VanderClock, Finance Commissioner & Janet Riley, Treasurer

INCOME	2018-19 Actual	2019-20 Actual	2020-21			% Change
			Adopted Budget	Actual	Proposed Budget	
Regular Income						
Pledges	118,600	121,160	118,000	114,339	120,000	1.7%
Rentals	51,514	48,684	50,000	20,945	50,000	0.0%
Gifts/Offerings	9,951	9,716	10,000	6,608	10,000	0.0%
Ways & Means	9,204	7,437	8,000	8,615	8,000	0.0%
Sale of FPW History Books	0	0	0	0	1,650	
Clothing Exchange	4,500	4,500	4,500	4,500	2,500	-44.4%
Subtotal Regular Income	193,768	191,496	190,500	155,007	192,150	0.9%
Other Income						
From General Endowment	112,000	111,000	110,000	110,000	109,000	-0.9%
From Endowment Restricted Purpose Funds	5,580	5,580	4,000	4,000	4,000	0.0%
Subtotal Income From Endowment	117,580	116,580	114,000	114,000	113,000	-0.9%
Net Other Income minus Expenses						
Landscaping Project	880.00	0	-	-	-	
Other Income	94.17	725	-	-	-	
Other Grants and Special Fundraising	900	1,000	1,000	1,000	900	-10.0%
Subtotal Other Non-Endowment Income	1,874	1,725	1,000	1,000	900	-10.0%
Total Income	313,222	309,801	305,500	270,007	306,050	0

EXPENSES	2018-19 Actual	2019-20 Actual	2020-21			% Change
			Adopted Budget	Actual	Proposed Budget	
Personnel Expenses*	218,556	213,678	208,840	199,562	210,987	0
Salary & Wages	138,355	135,929	140,470	135,749	140,078	0
Housing - Minister	24,000	24,000	24,000	24,000	24,000	0
In Lieu of Employer FICA	5,553	5,665	5,948	5,948	5,773	0
Health Insurance Expense	14,783	15,322	3,719	4,936	6,424	1
Dental Insurance Expense	560	696	726	687	120	-1
Long Term Disability & Life Insurance	0	0	0	0	1,600	
Pension Contributions	15,349	10,964	13,263	12,593	12,889	0
Community Minister & Sabbatical Coverage	5,000	6,000	4,000	4,000	0	-1
Social Security & Medicare	6,866	6,569	6,634	6,275	6,778	0
Employer MA State Tax	3	31	0	1	0	
Professional Expenses	6,329	6,793	8,400	3,535	11,450	0
Workers' Compensation Insurance	1,650	1,707	1,680	1,839	1,875	0
Payroll Service	109	0	0	0	0	

Property Expenses

Electricity	7,413	7,213	7,650	6,537	7,400	(0)
Fuel oil	1,021	4,115	1,800	594	1,800	0
Gas	4,511	3,904	4,700	3,725	4,700	0
Grounds Upkeep	2,084	620	2,200	2,392	2,200	0
Cleaning Service	7,440	6720	8,112	0	8,200	0
Snow Removal	3,100	3,200	3,200	3,900	4,000	0
Property Insurance	8,705	10,144	10,144	8,194	8,765	(0)
Repairs & Maint.	7,191	9,632	6,800	7,810	6,800	0
Supplies	2,263	2,425	2,300	528	2,300	0
Trash removal	1,904	1,617	1,980	-25	2,000	0
Water & Sewer	1,973	1,754	1,900	1,113	1,900	0
Capital Expenditures - Total	435	1,971	4,300	26,119	3,500	0
Subtotal Property Expenses	48,039	53,315	55,086	60,887	53,565	0

General Overhead Expenses

Office Expense	4,857	5,426	6,161	5,247	5,171	0
Telephone	3,308	3,679	3,058	3,080	3,187	0
UUA Contribution	4,695	4,695	4,718	4,718	4,760	0
UUA General Assembly Expenses	820	450	2,400	600	2,400	0
Retreat Subsidy - Net	-2,196	3,959	0	0	0	0
Subtotal General Overhead Expenses	11,484	18,209	16,337	13,644	15,518	0

Commission Expenses

Board Expenses and Board-Level Committees	285	326.92	500	225	500	0
Community Outreach - Total	0	16.92	700	500	1,180	1
Finance & Stewardship - Total	7,501	8,107	8,760	8,024	10,200	0
Membership Integration - Total	2,938	1,363	4,056	2,226	4,056	0
Music and Worship - Total	4,907	5,903	7,575	3,600	6,000	0
Religious Education - Total	4,854	3,246	5,650	4,605	5,600	0
Subtotal Commission Expenses	20,485	18,963	27,241	19,180	27,536	0

Other Expenses

Print FPW History Book (100 copies)	0	0	0	0	1,650	
Miscellaneous	-5,804	111	0	0	0	
Subtotal Other Expenses	-5,804	111	0	0	1,650	

Subtotal Non-Personnel Expenses	74,204	90,598	98,664	93,711	98,269	0
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Total Expenses	\$ 292,760	\$ 304,276	\$ 307,504	\$ 293,273	\$ 309,256	\$ 0
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Income minus Expense	\$20,462	\$5,525	(\$2,004)	(\$23,266)	(\$3,206)	\$1
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PPP Grant - 2020	\$0	\$0	\$0	\$37,672		
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Property Carry Forward	\$6,686	\$0	\$0	\$0		
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Net Carry Forward	\$13,776	\$5,525	(\$2,004)	\$14,406		
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Cumulative Surplus from prior year	\$12,094	\$25,869	\$31,395	\$29,391	\$43,797	
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Notes about the Proposed Budget 2021-2022

Overall Increase

The total amount of proposed budgeted expenses for FY 2022 is increasing by 0.6% or \$309,256.

Income

- Budgeted pledges are \$120,000.
- Budgeted rental income is \$50,000; in FY 2021, this category of income fell short by about \$29,000 because the building was only being used minimally. With the building opening again, we expect to restore this category of income.
- The budgeted amount for Ways & Means income (auctions and other fundraising) is \$8,000.
- The contribution by the Clothing Exchange will only be \$2,500 because they have been closed for most of FY 2021.

Endowment

Prudent use of our endowment funds suggests drawing no more than 4-5% of the value each year. Our pledge and other income are insufficient to support our current level of programming. We aim to keep the endowment draw, both dollar amount and percentage, as low as possible, and to reduce at least the dollar amount each year. For FY 2022, we are again reducing the draw from the endowment funds (both restricted and unrestricted funds) from \$114,000 to \$113,000, a reduction of \$1,000 or 0.9%. This amount represents approximately 4.7% of the value of the endowment, the lowest level ever, which is good news. The question will be whether or not, going forward, with increased demands on the budget, we can maintain a sustainable draw. Ideally, we will be able to attain modest gains in membership in order to increase income from pledges.

Personnel Expenses

- Compensation plans incorporate the recommendations of the Personnel Committee, which strives to stay within UUA fair compensation guidelines while also being mindful of inflation. Staff members will receive a 1.2% cost of living increase, as recommended by the UUA.
- The amount for the Interim Minister reflects what has been negotiated with Rev. Frieda Gillespie, including benefits as recommended by the UUA. Rev. Gillespie is covered for health and dental insurance by her wife; therefore, we will not bear that cost. It is important to note that when we call a new settled minister, we will likely be facing an approximately \$15,000 increase in the budget for health insurance.
- The amount for the Community Minister has been increased to correspond with the appropriate UUA fair compensation guidelines for a 10 hour per week ministerial position. Rev. Rebecca Sheble-Hall will continue to participate in Sunday worship services, preach occasional sermons, develop programs to build strong relationships between the congregation and the greater community, and provide support to pastoral care, as time is available.
- The Director of Community Engagement is budgeted at 20 hours per week instead of 30, a change that was made in mid-year FY 2021.
- Health insurance expense reflects a modest level of contribution for both the Director of Community Engagement and the Office Manager. There is a premium increase of 10% as of July 1.
- Funds are provided for temporary office coverage, if needed when the Office Manager is on vacation.

UUA contribution

Each year, the Unitarian Universalist Association requests contributions from member congregations based on a percentage of the annual operating budget. The “ask” from the UUA will increase by no more than 10% annually until the ask reaches 6% of our operating budget. We have increased the UUA contribution each year as our regular income increases, but we are quite a bit below the “ask.” The finance committee recommends that the contribution for FY 2021 increase by the amount we anticipate regular income to increase, or 0.9%.

General Overhead Expenses

This budget is decreasing, because a computer was replaced in FY 2021, which is not necessary in FY 2022. Funding is provided for delegate attendance at the annual UUA General Assembly (GA) in order to better offset the cost of attendance. No retreat subsidy is included because the 2021 Ferry Beach retreat was canceled.

Community Outreach

In anticipation of the re-opening of the building, two Waltham Connect events are planned, as well as support for a Christmas Eve community dinner, a Juneteenth community celebration and other events.

Finance & Stewardship

The rate charged by our accounting service increased by 19% for FY 2022, after no increase in FY 2021.

Music & Worship

The rate for musicians is increased to meet market demand with a corresponding decrease in number of guest musicians. The cost of guest speakers is increased to meet UUA guidelines, but the number is reduced since Rev. Becky will preach as part of her regular responsibilities. Funds are included to move the piano back to church and to allow the Music Director to participate in a UU Music Certification Program.

Religious Education

This budget includes the usual funding for teaching staff, curriculum materials, lifespan classes, and support for Jr & Sr Youth Group.

Other Expenses

There are funds included to print an updated First Parish history book in honor of our 325th year. The amount is expected to be fully offset by income from sale of the books.

Income minus Expense

Conservative budgeting has resulted in surplus funds in our bank account, although much of that surplus has been used during the current year due to the shortfall in rental income and gifts and offerings. Taking advantage of the empty building, we made the decision to paint the sanctuary this spring, which used a large part of the accumulated surplus; however, the Payroll Protection Program (PPP) grant of \$37,672 received from the federal government more than replenished those funds.

For FY 2022, we plan to use \$3,206 of this excess cash to support our operating budget, after which we will still have a balance more than adequate to cover all cash flow needs.

Cumulative Surplus from prior year

This line tracks the net extra cash in our bank account resulting from budget surpluses, as it accumulates from one year to the next. For example, if actual income and expenses exactly match our budget in FY 2022, we would end the year with at least $\$43,797 - 3,206 = \$40,591$ in excess cash available for future use. Most years, we end with a surplus. This year was unusual because of the impact of the pandemic and our inability to use the building, resulting in significant loss of rental income.

Coronavirus Pandemic Considerations

This budget assumes relatively normal operations during FY 2022. Should we experience a shortfall in income again because of rental income loss or for other reasons, the cumulative surplus is available to be used.

First Parish in Waltham - Proposed Budget 2021-2022

Donna VanderClock, Finance Commissioner

Income

Regular Income

Pledges	
Rentals	120,000
Gifts/Offerings	50,000
Ways & Means	10,000
Sale of FPW History Books	8,000
Clothing Exchange	1,650
Subtotal Regular Income	<u>2,500</u>
	192,150

Other Income

From General Endowment	109,000
From Endowment Restricted Purpose Funds	<u>4,000</u>
Subtotal Income From Endowment	113,000

Net Other Income minus Expenses

Other Grants and Special Fundraising	<u>900</u>
Subtotal Other Non-Endowment Income	900

Total Income	\$ 306,050
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Expenses

Personnel Expenses

Minister Salary & Housing	75,460
Director of Community Engagement Salary	26,312
Music Director Salary	12,544
Community Minister Salary	10,454
Office Manager Compensation	27,115
Grounds Keeper Compensation	11,393
Temporary Office Coverage	800
Social Security & Medicare	12,551
Medical & Dental Insurance	6,544
Long Term Disability & Life Insurance	1,600
Pension Contributions	12,889
Professional Expenses	11,450
Workers' Compensation Insurance	<u>1,875</u>
Total Personnel Expenses	210,987

Property Expenses

Electricity	7,400
Fuel oil	1,800
Gas	4,700
Grounds Upkeep	2,200
Cleaning Service	8,200
Snow Removal	4,000
Property Insurance	8,765
Repairs & Maint.	6,800
Supplies	2,300
Trash removal	2,000
Water & Sewer	1,900
Capital Expenditures - Total	<u>3,500</u>
Total Property Expenses	53,565

General Overhead Expenses

Office Expense	5,171
Telephone	3,187
UUA Contribution	4,760
UUA General Assembly Expenses	2,400
Subtotal General Overhead Expenses	15,518

Commission Expenses

Board and Committee Expenses	500
Community Outreach/Social Action	1180
Finance & Stewardship	
Accounting	9,000
Stewardship Dinner	700
Bank Fees	500
Finance & Stewardship Total	10,200

Membership Integration	
Marketing & Promotion	3,331
Membership Integration-Other	725
Membership Integration - Total	4,056

Music and Worship	
Musicians	1,550
Guest Speaker	760
Music/Worship Supplies	800
Flowers	500
Instrument Maintenance	900
Music/Worship Other	1,490
Music and Worship - Total	6,000

Religious Education	
Teaching Staff	3,500
Curriculum Materials	650
Jr/Sr Youth Group	250
Lifespan Programs/Events	500
Buddhist Meditation Group	650
Religious Education - Other	50
Religious Education - Total	5,600

Subtotal Commission Expenses 27,536

Other Expenses - Print FPW History Book 1,650

Subtotal Non-Personnel Expenses 98,269

Total Expenses \$ 309,256

Income minus Expense (\$3,206)
Surplus from prior year \$3,206

Income and Expense Statement - Fiscal Year Actuals v. Budget

June 1, 2020 - May 31, 2021

Janet Riley, Treasurer

Income	Adopted Budget	Actual	Remaining	% of Budget
Regular Income				
Pledges	118,000	114,339	3661	97%
Rentals	50,000	20,945	29055	42%
Gifts/Offerings	10,000	6,608	3392	66%
Ways & Means	8,000	8,615	-615	108%
Clothing Exchange	4,500	4,500	0	100%
Subtotal Regular Income	190,500	155,007	35,493	81%
Other Income				
From General Endowment	110,000	110,000	0	100%
From Endowment Restricted Purpose Fund:	4,000	4,000	0	100%
Subtotal Income From Endowment	114,000	114,000	0	100%
Other Grants and Special Fundraising	1,000	1,000	0	100%
Subtotal Other Non-Endowment Income	1,000	1,000	0	100%
Total Income	\$305,500	\$270,007	\$35,493	88%

Expenses	Adopted Budget	Actual	Remaining	% of Budget
Personnel Expenses				
Salary & Wages	140,470	135,749	4,722	97%
Housing - Minister	24,000	24,000	0	100%
In Lieu of Employer FICA	5,948	5,948	0	100%
Health Insurance	3,719	4,936	-1,217	133%
Dental Insurance Expense	726	687	39	95%
Retirement Plan Expense	13,263	12,593	670	95%
Workers Comp	1,680	1,839	-159	109%
Professional Expenses	8,400	3,535	4,865	42%
Community Minister & Sabbatical	4,000	4,000	0	100%
SS/Medicare- Church's portion	6,634	6,275	359	95%
Employer MA State Tax	-	1	-	-
Total Personnel	208,840	199,562	9,278	96%
Property Expenses				
Electricity	7,650	6,537	1113	85%
Fuel oil	1,800	594	1206	33%
Gas	4,700	3,725	975	79%
Grounds Upkeep	2,200	2,392	-192	109%
Cleaning Service	8,112	0	8112	0%
Snow Removal	3,200	3,900	-700	122%
Property Insurance	10,144	8,194	1950	81%
Repairs & Maint.	6,800	7,810	-1010	115%
Supplies	2,300	528	1772	23%
Trash removal	1,980	-25	2005	-1%
Water & Sewer	1,900	1,113	787	59%
Capital Expenditures	4,300	26,119	-21819	607%
Total Property Expenses	55,086	60,887	-5801	111%

General Overhead Expenses				
Office Expense	6,161	5,247	914	85%
Telephone	3,058	3,080	-22	101%
UUA Contribution	4,718	4,718	0	100%
GA Expenses	2,400	600	1800	25%
Retreat Subsidy - Net	-	-	0	0%
Total General Overhead Expenses	16,337	13,644	2,693	84%
Commission Expenses				
Board Expenses and Board-Level Committee	500	225	275	45%
Community Outreach	700	500	200	71%
Finance & Stewardship				
Accounting	7,560	7,560	0	100%
Bank Service Charges	500	464	36	93%
Finance & Stewardship-Other	700	-	700	0%
Total Finance & Stewardship	8,760	8,024	736	92%
Membership Integration				
Membership Integration-Other	3,331	2,226	1105	67%
Marketing & Promotion	725	-	725	0%
Total Membership Integration	4,056	2,226	1,830	55%
Music and Worship				
Musician	3,075	100	2,975	3%
Guest Speaker	1,750	2,300	(550)	131%
Music/Worship Supplies	700	284	416	41%
Flowers	500	176	324	35%
Instrument Maintenance	800	145	655	18%
Music & Worship-Other	750	595	155	79%
Total Music and Worship	7,575	3,600	3,975	48%
Religious Education				
Teaching Staff	3,000	2,350	650	78%
Curriculum Materials	700	681	19	97%
Jr/Sr Youth Group	250	74	176	30%
Lifespan Programs/Events	1,000	1,500	(500)	150%
Religious Education - Other	50	-	50	0%
Buddhist Meditation Group	650	-	650	0%
Total Religious Education	5,650	4,605	1,045	82%
Subtotal Commission Expenses	27,241	19,180	8,061	70%
Other Miscellaneous Expenses	-	-	0	
Subtotal Non-Personnel Expenses	98,664	93,711	4,953	95%
Total Expenses	\$307,504	\$293,273	\$14,231	95%
Net Operating Income	(\$2,004)	(\$23,266)	\$21,262	
Other Income				
Interest & Dividend Income	-	2		
Jones Partnership Fund	-	35,000		
Memorial Gifts & Bequests	-	200		
Minister's Discretionary Fund donations	-	4,585		
Payroll Protection Program Loan Forgiveness	-	37,982		
Piano Repair fund	-	8,775		
Rev. Marc Retirement Gift Collection	-	2,064		
Share the Plate	-	2,296		
Total Other Income	-	88,608		
Other Expenses				
Jones Partnership Fund	-	37,200	*	
Minister's Discretionary Fund Expenses	-	4,236		
Piano Repair fund	-	4,525	**	
PPP Loan Accrued Interest	-	310		
Rev Marc Retirement Gift Expenditures	-	301		
Total Other Expenses	-	46,571		
Net Other Income	-	42,037		

* The Jones Fund expenses include re-issuing a \$2,200 check for an FY20 recipient. The funding was

** The piano repair fund was fully spent and is at \$0. All funds were received in FY21. A \$4250 down

Assistant Treasurer's Report

First Parish in Waltham Universalist-Unitarian Part 1: Budgeted Income Received by the Assistant Treasurer

Income	2020-21 Budget	2020-21 YTD	% YTD	2019-20 Budget	2019-20 YTD	% YTD	2018-19 Budget	2018-19 YTD	% YTD
Regular Income									
41120 · Pledges (FY2020-21)	\$ 118,000	\$ 114,339	97%	\$ 117,000	\$ 118,950	102%	\$ 122,000	\$ 118,600	97%
41123 · Hall Rental	\$ 50,000	\$ 20,945	42%	\$ 50,000	\$ 48,896	98%	\$ 46,000	\$ 51,514	112%
41124 · Gift/Offerings/WMBG	\$ 10,000	\$ 6,608	66%	\$ 10,000	\$ 9,716	97%	\$ 10,000	\$ 9,951	100%
41126 · Ways & Means	\$ 8,000	\$ 8,605	108%	\$ 8,000	\$ 7,437	93%	\$ 8,000	\$ 9,203	115%
41127 · Clothing Exchange	\$ 4,500	\$ 4,500	100%	\$ 4,500	\$ 4,500	100%	\$ 4,500	\$ 4,500	100%
Subtotal Regular Income	\$ 190,500	\$ 154,997	81%	\$ 189,500	\$ 189,498	100%	\$ 190,500	\$ 193,767	102%
Other Budgeted Income									
41140 · General Endowment	\$ 110,000	\$ 110,000	100%	\$ 111,000	\$ 111,000	100%	\$ 112,000	\$ 112,000	100.00%
Restricted Purpose Funds	\$ 4,000	\$ 4,000	100%	\$ 5,580	\$ 5,580	100%	\$ 5,580	\$ 6,061	109%
Subtotal Income from Endowment	\$ 114,000	\$ 114,000	100%	\$ 116,580	\$ 116,580	100%	\$ 117,580	\$ 118,061	100%
Jones Partnership Grants									
Other Grants and Fundraising	1000	\$1,000.00	100%	1000	\$1,000.00	100%	900	\$900.00	100%
Subtotal Other Non-Endowment Income	1000	\$1,000.00	100%	1000	\$1,000.00	100%	900	\$900.00	100%
Total Budgeted Income	305,500	\$269,997.39	88%	307,080	\$307,078.15	100%	308980	\$312,728.14	101%

Notes:

Hall rental includes the Waltham Day Care : \$13,560 for FY21; (\$13,446 for FY20).

The Waltham Buddhist Meditation Group contributed \$1325 to Gifts and Offerings.

Respectfully submitted
Leslie Gildersleeve
Assistant Treasurer
June 2, 2021

First Parish In Waltham Universalist-Unitarian
Part 2: Non-Budgeted Income, Donations, Special Projects Revenues

Non-Budgeted Receipts & Transactions	
Special Collections	\$ 9,332
Advance Pledges 21-22	\$ 20,500
Memorial Fund	\$ 200
Temporary Funds includes Jones	\$ 44,377
Partnership Fund from Trustees	
Capital Improvements: Steinway Piano	\$ 8,775
Total Non-budgeted Receipts	\$ 74,409

Share The Plate and other Special Collections	
Chaplains on the Way	\$ 275
Waltham Boys & Girls Club	\$ 1,230
UU Mass Action	\$ 401
Minister's Discretionary Fund	\$ 1,853
Neighbors Who Care	\$ 122
Africano	\$ 582
Waltham Philharmonic	\$ 174
Healthy Waltham: Interfaith Service	\$ 439
Chaplains on the Way: Interfaith Service	\$ 639
Waltham Family School	\$ 472
Waltham Land Trust	\$ 324
Opportunities for Inclusion	\$ 315
Rev. Marc Parting Gift	\$ 2,506
Total	\$ 9,332

Temporary Funds	
Clothing Exchange Gifts for Tree Removal (June 2020)	\$ 1,000
Voided Checks	\$ 6,160
Refund from Republic Service: credit to Property	\$ 180
Church Mutual Dividend	\$ 582
IRS Refund	\$ 1,238
Church Mutual Return on Premium	\$ 19
Jones Partnership Fund, Trustees	\$ 35,000
Guide One Insurance Refund	\$ 19
Total	\$ 44,197

Memorial Fund (includes David Clough Music Fund)	
In memory of Jane Clough	\$ 200
Total	\$ 200

Respectfully submitted,
Leslie Gildersleeve
Assistant Treasurer

Trustees of the Permanent Funds Report

FISCAL YEAR RESULTS

The fiscal year began March 1, 2020, with three weeks continuation of stock market free-fall caused by the coronavirus pandemic. From its peak in mid-February, our portfolio lost 25% in value. Then – suddenly the market turned, and has been rising ever since. For the full fiscal year ended 2/28/2021 the Return on Investment was a rather remarkable 15%, equal to **\$317,073**. This brought the portfolio value to **\$2,346,338**.

THE PERMANENT FUNDS AND PRUDENT EXPENDITURE

Expenditures from the Permanent Funds have moved into the “prudent” range for only the second time in 40 years. Traditionally, prudent spending from endowment funds was viewed as 3% to 6% of principal, annually. In recent years, when interest rates have been unusually low, that range is now often defined as 3% to 5%.

For the fiscal year ended 2/28/2021, expenditures were **5.6%** of principal, and for fiscal 2022 they are projected to be **5.0%**. The consequence of these improvements is to make the endowment more sustainable, and to allow the Trustees to invest less aggressively (less risk).

The reasons for the improvement are all of these: (1) good return on investments (2) good control of the operating budget (3) generosity of members in pledging (4) generosity of former members in bequests to First Parish (2019 Inez Ward \$318,000; 2020 Lawrence Lynnworth \$62,000; and many others over the years, see Table UU21T4).

THE PERMANENT FUNDS AND PRUDENT INVESTMENT

With a long investment horizon, stocks will always beat fixed-income or money market. When there are periods of loss, you wait them out until prices recover. If you also must take out a large annual draw whether the market is up or down, it can seriously interfere with recovery from a loss. For 40 years we have been in the position of needing the high return offered by stocks. The Trustees give their best effort by skill and luck, to “time the market” by selling stock when it appears significantly over valued. This is not recommended, and is not a prudent policy.

For example: review the attached graph of Permanent Funds Value for two cases. In 2001 we anticipated the dot-com bubble and sold a large amount of stock. When the losses came, they were contained to -23%, and the portfolio recovered in 2 years’ time. Contrast to 2008 when we failed to anticipate the housing bubble, and lost -42%, which took 11 years to recover.

The point is that depending on luck to time the market is now a hazard that can be reduced. With annual expenditure from the Permanent Funds now at a prudent level, we will be able to invest with less risk.

TABLES INCLUDED

UU21T1 – Comparative summary of results for five years.

UU21T2 – Detailed investment results for the latest year.

UU21T3 – Current investment portfolio by categories.

UU21T4 – Analysis of the Named Funds.

Graph – Permanent Funds compared to Consumer Price Index

Respectfully submitted,
Trustees of the Permanent Funds
David S. Wilbourn
Barry W. Stearns
Joel P. Weddig

Five Year Comparative Report of Assets & Operating Results

TRUSTEES OF THE PERMANENT FUNDS 5 YEAR COMPARATIVE REPORT OF ASSETS & OPERATING RESULTS

Table UU21T1A
SUMMARY OF ASSET ALLOCATIONS

	2/28/17	%	2/28/18	%	2/28/2019	%	2/29/2020	%	2/28/2021	%
Cash & Short-Term Income	101,303	6	47,037	2	96,571	5	80,171	4	292,068	12
Fixed Assets (Gas Boiler)	36,600	2	30,500	2	24,400	1	18,300	1	12,200	1
CD's, Bonds, Bond Funds	11,226	1	11,673	1	11,827	1	84,103	4	186,990	8
Low Correlation Funds	136,828	8	79,900	4	85,050	5	144,109	7	311,439	13
Equity Securities, Value	303,705	17	309,875	16	283,967	16	385,397	18	255,447	11
Growth & Blended Funds	857,210	48	1,018,196	53	1,060,299	58	951,238	46	997,077	42
International Funds	329,986	19	423,320	22	252,917	14	423,492	20	291,116	12
	1,776,858		1,920,501		1,815,032		2,086,810		2,346,337	
Change in Asset Value			143,643		(105,470)		271,778		259,527	
Percentage Change			8.1%		-5.5%		15.0%		12.4%	
Annual Inflation Rate			2.2%		1.5%		1.5%		1.7%	
Growth or Loss after Inflation			5.9%		-7.0%		13.5%		10.7%	

Table UU21T1B
SUMMARY STATEMENT OF RETURN ON INVESTMENTS, AND DISBURSEMENTS

	12 Months 2/28/2017	12 Months 2/28/2018	12 Months 2/28/2019	12 Months 2/29/2020	12 Months 2/28/2021
Opening Assets	1,615,438	1,776,856	1,920,501	1,815,032	2,086,810
Funds Rec'd from Jones FBO Trust	34,313	36,750	38,625	39,188	39,188
Legacy Gifts Received	-	-	-	318,039	62,817
Return on Investments (Income+Gain)					
Cash & Short-Term Income	(32)	246	866	1,364	654
Depreciation, Fixed Assets	(6,100)	(6,100)	(6,100)	(6,100)	(6,100)
CD's, Bonds, Bond Funds	1,456	447	154	(2,725)	6,244
Low Correlation Funds	31,145	21,736	10,513	(10,665)	68,170
Equity Securities, Value Style	52,920	1,705	(15,724)	9,078	26,171
Growth & Blended	151,678	164,206	45,686	83,886	161,597
International Funds	57,270	93,335	(24,390)	20,575	60,336
	288,337	275,575	11,004	95,412	317,071
<u>Disbursements</u>					
To Church Operating Budget	127,079	119,317	113,349	111,250	110,250
Other Specific Projects Voted	-	-	-	-	-
Special Purpose Funds	9,152	9,365	9,399	9,654	9,299
Trustee's Expense	-	-	-	-	-
Expenses Subtotal	136,231	128,681	122,748	120,904	119,549
To Jones Partnership	25,000	40,000	32,350	36,730	35,000
Other Jones Non-Budget Exp.	-	-	-	23,227	5,000
	(161,231)	(168,681)	(155,098)	(180,861)	(159,549)
<u>Closing Assets</u>	1,776,856	1,920,501	1,815,032	2,086,810	2,346,338
<u>Components of Return on Investment</u>					
Interest & Dividends Received	24,941	22,995	24,708	27,684	24,381
Gain or Loss of Market Value	263,396	252,580	(13,704)	82,820	292,692
Total Return	288,337	275,575	11,004	110,504	317,073
<u>As Percentages of Opening Assets</u>					
Total Return on Investments	17.8%	15.5%	0.6%	6.1%	15.2%
Total Expenditures (Excluding Jones Partnership)	8.4%	7.2%	6.4%	6.7%	5.7%

Investment Results for the Year Ending 2/28/2021

TRUSTEES OF THE PERMANENT FUNDS

UU21T2

INVESTMENT RESULTS FOR THE YEAR ENDED 2/28/21

	VALUE 2/29/2020 \$	TRANSACTIONS Date	Amount \$	VALUE 2/28/2021 \$	TOTAL RETURN (Income + Gain) \$ %	----- INCOME ----- Withdraw	Reinvest	CAPITAL Gain ,
Cash & Short-Term Income								
Fidelity Money Mkt Accounts	80,171	Various		292,068	339	0	82	257
Vanguard Money Mkt Acct	-	Various	+/-	-	316		316	-
Accounts Receivable	-		-	-	-	0.0%	-	-
Accounts Payable (Minus)	-		-	-	-	0.0%	-	-
	80,171		-	292,068	655	0.0%	02/01/01	257
Fixed Assets (Gas Boiler)								
	18,300	Depreciate	(6,100)	12,200	(6,100)			(6,100)
CD's, Bonds & Bond Funds								
Loomis Sayles Bond Fund	12,394			12,761	367	3.0%	-	408
Fidelity Floating Rate Hi Inc.	-	44,238	110,000	110,402	402	0.4%		168
Fidelity Capital & Income	71,708	03/24/20	(13,356)	63,828	5,476	9.4%		2,053
	84,102		96,644	186,990	6,244	3.5%	-	2,629
Growth & Income Blended Funds								
Fidelity Puritan (Alice Smith)	237,796		-	301,234	66,522	28.0%	3,084	-
UUA Gen. Invest. Fund	8,609		-	10,134	1,910	22.2%	385	-
Vanguard Dividend Growth	97,055	03/23/20	(18,474)	86,987	8,406	10.7%		1,405
	343,460		(18,474)	398,355	76,839	23.6%	3,469	1,405
Low Correlation Funds								
EatonVance Enhanced Equity 2 Merger Fund	144,109			201,625	68,357	47.4%	10,841	-
		02/11/21	110,000	109,813	(187)	-0.2%		(187)
	144,109		110,000	311,439	68,170	35.9%	10,841	-
Equity Securities, Value Style								
Berkshire Hathaway 'B'	198,912	various	(87,465)	108,470	(2,977)	-2.7%	-	(2,977)
T Rowe Price Small Cap Value	139,186	03/24/20	(22,888)	146,977	30,680	26.4%		473
Southwest Airlines memb pledge		03/23/20	328					
Texas Pacific Land Trust memb pledge		03/23/20	1,706					
Southwest Airlines sold		08/11/20	(332)		4	1.3%		4
Texas Pacific Land Trust sold		08/11/20	(1,756)		49	2.8%		49
Vanguard Value Index,(legacy gift)		03/23/20	6,678					
Vanguard Value Index, sold		03/25/20	(6,706)		28	0.4%		28
Equifax	47,299	various	(45,686)	-	(1,613)	-1.7%	227	(1,840)
	385,397		(156,120)	255,447	26,171	11.4%	227	473
Growth Mutual Funds								
IShares Momentum ETF (MTUM)		02/12/21	108,571	100,998	(7,573)	-7.0%		(7,573)
IShares Russell 2000 ETF (IWM)		02/12/21	60,000	57,513	(2,487)	-4.1%		(2,487)
Fidelity Select Health	256,421	05/26/20	(100,467)	227,935	71,981	46.2%	-	1,372
Fidelity Select Leisure	145,121	various	(107,555)	-	(37,565)	-14.9%	-	17
Fidelity Select Technology	52,191	03/24/20	(10,153)	66,875	24,837	59.1%	-	50
Vanguard Growth Index	154,045	various	(44,164)	145,401	35,520	32.3%	-	986
SPDR S&P Midcap 400 ETF(legacy gift)		03/23/20	5,521	-				
SPDR S&P Midcap 400 ETF, Sold		03/25/20	(5,568)	-	47	0.8%		47
	607,778		(93,815)	598,722	84,758	14.9%	-	2,425
International Funds								
Vanguard International Value	144,738	03/23/20	(26,193)	136,393	17,848	15.1%		2,057
Vanguard Admiral Int'l Growth	278,754	various	(166,519)	154,723	42,488	37.9%	-	458
	423,492		(192,712)	291,116	60,336	19.4%	-	2,515
Totals								
Starting Portfolio Value	2,086,809	Column totals		2,346,337	317,073	15.2%	14,935	9,446
Plus New Funds Received	102,005							
Plus Investment Return	317,073						24,381	Total Income
Less Expenditures	(159,549)							
Ending Portfolio Value	2,346,338							

Investment Portfolio as of 3/1/2019

TRUSTEES OF THE PERMANENT FUNDS

UU21T3 INVESTMENT PORTFOLIO

	Symbol	Shares	Price \$	Value \$	Percent of Portfolio
<u>Cash & Short-Term Income</u>					
Fidelity Money Mkt Accounts		-	-	292,069	12.4%
Accounts Receivable		-	-	-	0.0%
Accounts Payable (Minus)		-	-	-	0.0%
				292,069	12.4%
<u>Fixed Assets</u> (Gas Boiler)				18,300	0.9%
<u>CD's, Bonds & Bond Funds</u>					
Loomis Sayles Bond Fund	LSBDX	956	13	12,761	0.5%
Fidelity Float Rt Hi Income	FFRHX	11,720	9	110,402	4.7%
Fidelity Capital & Income	FAGIX	5,797	11	63,828	2.7%
				186,992	7.9%
<u>Growth & Income Blended Funds</u>					
Fidelity Puritan	FPURX	11,252.7	26.77	301,234	12.8%
UUA Common Endowment Fund		884.3	11.46	10,134	0.4%
Vanguard Dividend Growth	VDIGX	2,670.8	32.57	86,987	3.7%
				398,355	16.9%
<u>Low Correlation Funds</u>					
EatonVance Enhanced Equity 2	EOS	9,144	22	201,625	8.6%
Merger Fund	MERFX	6,222	18	109,813	4.7%
				311,438	13.2%
<u>Equity Securities, Value Style</u>					
Berkshire Hathaway 'B'	BRK.B	451	240.51	108,470	4.6%
T.Rowe Price SmallCap Value Fund	PRSVX	2,542	57.82	146,977	6.2%
				255,447	10.9%
<u>Growth Mutual Funds</u>					
IShares Momentum ETF	MTUM	620.0	162.90	100,998	4.3%
ISHARES RUSSELL 2000 ETF	IWN	263.4	218.31	57,513	2.4%
Fidelity Select Health	FSPHX	7,091.9	32.14	227,935	9.7%
Fidelity Select Technology	FSPTX	2,430.9	27.51	66,875	2.8%
Vanguard Growth Index	VIGAX	1,116.2	130.27	145,401	6.2%
				598,722	25.5%
<u>International Funds</u>					
Vanguard Int'l Value Fund	VTRIX	3,292.9	41.42	136,393	5.8%
Vanguard Admiral Int'l Growth	VWILX	943.5	163.99	154,723	6.6%
				291,116	12.4%
Portfolio Total 3/01/2021				2,352,439	100.1%

ANALYSIS OF THE NAMED FUNDS - Table UU21T4

Year & Source	Fund Name	Specified Purpose	Principal	Restrictions by Donor			Accumulated Income in Restricted Funds			
			2/29/20	None	Principal	Income	2/28/19	Income	Expense	2/29/20
1961 UU	Alliance Memorial	Flowers	200			X	17	7		24
1939 U	Fred W. Archibald	Flowers	401			X	136	15		151
1930 W	Sarah J. Bartlett	Flowers	100			X	244	4		248
1994 UU	Eaton/Chase Family	Flowers	700			X	55	26		81
1923 W	Ernest H. Griswold	Flowers	295			X	280	11		291
1984 UU	Guild Flower Fund	Flowers	893			X	81	33		114
1992 UU	Risdon Memorial	Flowers	3,000			X	54	111		165
1962 UU	Sears Memorial	Flowers	250			X	348	9	300	57
1990 UU	Deacon Smith Family	Flowers	2,263			X	674	84	400	358
1942 U	Walter Stearns	Flowers (\$100)	7,000		X	[100]	137	4		141
1907 B	John C. Haynes	Charity Work	7,988			X	2,295	296	1,000	1,591
1875 U	Eunice Harrington	Needy Poor	2,662			X	763	98		861
1882 B	Lucy Chipman	Poor of the Church	944			X	536	35		571
1900 B	Sarah A. Davenport	Poor of the Church	910			X	483	34		517
1725 P	Mills Ripley	Poor of the Church	1,102			X	631	41		672
1881 U	Polly Sanderson	Poor of the Church	2,223			X	1,098	82		1,180
1955 U	Annie W. Smith	Poor of the Parish	11,067			X	3,177	409	1,000	2,586
1999 UU	Castner Memorial	Music	6,283			X	157	232		389
1992 UU	David E. Clough	Music	1,830			X	68	68		136
2012 UU	Irene Kallow	Music	43,054			X	2,683	1,593	2,000	2,276
1950 W	Walter F. Starbuck	Music	580			X	13	21		34
2004 UU	Betty Lee Diggs	Music (Organ)	25,000			X	775	925	1,000	700
1972 UU	Martha Abbott	Children's Library	1,400			X	402	52		454
1996 UU	Dr. Douglas Butman	Property Maint.	30,000			X	(1,920)	1,110		(810)
1966 W	Alice J. Mason	First Parish Guild	500			X	283	19	300	2
1942 U	Alice S. Peabody	Sunday School	300			X	231	11		242
1992 UU	Ted Jones Scholarship	UUA Scholarships	8,402			X	1,402	311		1,713
1926 W	Alice L. Smith	Pastor's Supplement	301,234	****		X	12	3,084	3,299	(203)
2007 UU	Jones Trust	Non-Budget Initiatives	---	**		X	66,045	39,254	40,000	65,299
1913 U	Clara Abbott	----	500			X	81,160	47,979	49,299	79,840
1905 W	George L. Almy	----	500			X				
1921 W	Abby E. Armstrong	----	300			X				
1923 W	Phineas & Mary Barnes	----	1,969	***		X				
1935 B	Mary E. Barry	----	2,000			X				
1927 W	Fred & Mary Bryant	----	2,565	***		X				
1919 B	Luther & Mary Gilbert	----	10,000			X				
1967 UU	Helen M. Howe	----	6,560			X				
1900 B	William H. Ireland	----	4,000			X				
2007 UU	Ted & Nathalie Jones WCRB	----	203,891			X				
1922 U	Mary Gardner Lamb	----	1,500			X				
1911 B	Joseph W. Leighton	----	12,000			X				
1916 W	Alice & Arthur Mason	----	5,600	***		X				
1998 UU	Robinson Family	----	6,285			X				
1918 B	Susan E. Tyler	----	1,000			X				
1994 UU	Marguerite E. Chase	----	54,489			X				
1965 UU	Mary A. Hartwell	----	5,000			X				
1996 UU	Daniel B. Hinckley	----	2,000			X				
1967 UU	Evelyn G. Sears	----	10,000			X				
2019 UU	Inez Ward	----	318,039			X				
2020 UU	Lawrence C. Lynnworth	----	62,062			X				
2020 UU	General Memorial Fund	----	150			X				
1980 B	Beacon Property Fund	----	352,600			X				
1977 W	Parsonage Proceeds Fund	----	69,148			X				
2013 UU	Fixed Assets (Gas Boiler)	----	12,200			X				
Accumulated Income & Appreciated Value			741,398		661,558					79,840
Grand Total, All Funds			2,346,337		1,547,246	265,570	533,521			

Notes

- * Income added back into principal
- ** Principal is in the Jones FBO Trust
- *** Held in UUA Common Endowment Fund
- Income received quarterly
- Principal balances adjusted annually
- **** Principal invested in Fidelity Puritan Fund

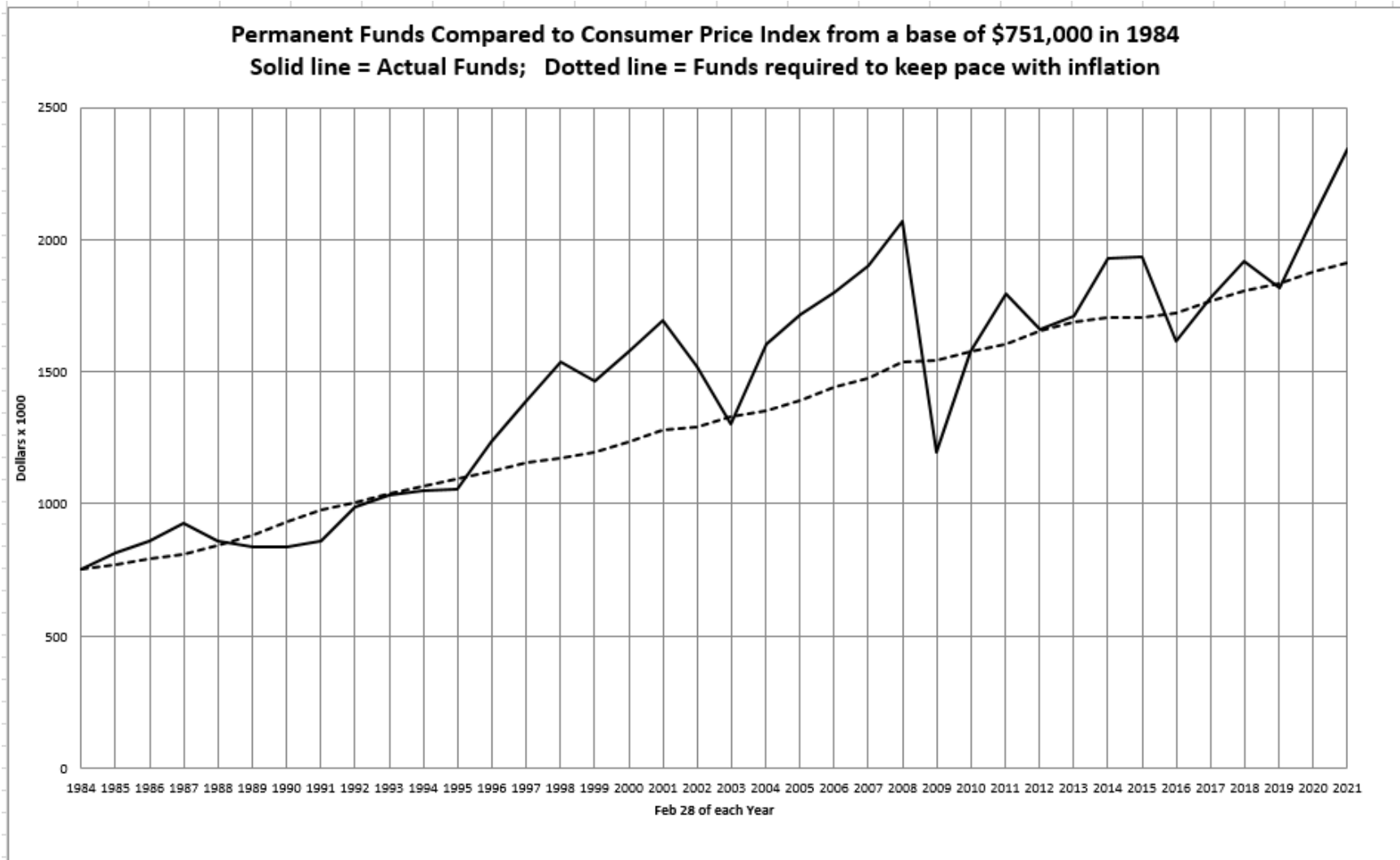
Income rate on Special Purpose Funds
= **3.7%**

Sources

- B** = Beacon Universalist
- W** = Waltham Universalist
- P** = Puritan predecessor
- U** = Unitarian before 1958
- UU** = Since merger in 1958

New legacy gifts can be made to existing
Named Funds or to newly named ones.

Permanent Funds Compared to Consumer Price Index



On-going comparative records of the Permanent Funds have been kept since 1984 at which time the total funds were \$751,000.

Each year we compare the actual funds balance to the amount that would have been needed to keep up with inflation.

Although the Consumer Price Index has more than doubled during this period, so have the Permanent Funds.

So the buying-power of the funds today is approximately 20% more than it was in 1984.

While keeping up with inflation, the funds have also contributed \$3.8 million to First Parish operations during these 37 years.

Jones Partnership Fund Grant Recipients 2020-2021

First Parish Waltham Jones Partnership Fund

African Cultural Services Inc.	\$1,500
Sponsor: Susan Weddig	
Trying to keep the immigrant families together, facilitating social events for learning and keeping these communities aware of their heritage. Attention will be drawn to the older folks and the kids will be performing a play /skit on assimilation. The organization uses tools of stories and dialog to achieve its objectives	
The Cat Connection	\$1,400
Sponsor: Martha Gallagher	
Aim is to help low income and the immigrant population with spaying/neutering cats (who would otherwise not be able to afford these services). Educating the public of the advantages of spaying/neutering cats and the best way(s) to deal with community cats. The target goal for this project is reach15 cats.	
Chaplains on the Way	\$2,000
Sponsor: Leslie Gildersleeve	
Purchase McDonald's gift cards in bulk. Then, one of our chaplains will go to McDonald's on Main Street every weekday morning at 7:30am to hand out gift cards to unhoused people. Our goal is to be able to offer a card to anyone who needs it, so that all unhoused people have the option of at least one hot meal a day, and a meal in which they can choose what they eat. We expect to give 30-40 cards a day.	
Chesterbrook Community Foundation	\$800
Sponsor: Pam Penton	
The organization seeks to bring together children from three housing developments for a fall party. These are families that may be having only this party in the entire year. The aim is to have the young ones experience a moment perhaps they only wish for, this may also enhance their development both socially and personal morale.	
Community Day Center of Waltham	\$2,500
Sponsor: Roberta Trudeau	
This year's project focuses on health. Help will be provided to the homeless community on an as-needed basis, to cover co-pays, transportation to and from medical appointments and escort/ advocates to medical appointments where needed.	
Diaper Depot	\$2,200
Sponsor: Colleen Bradley-MacArthur	
The Diaper Depot distributes feminine products to mothers using a WIC or Mass Health. Products are purchased in bulk and re-packaged into monthly amounts for distribution. First Parish members and friends may contribute supplies to the project and assist with the distribution and/or packaging.	

Downtown Waltham Partnership***withdrew***

Planned event will not take place. Cancelled due to COVID-19.

Families for Depression Awareness**\$1,000**

Sponsor: Carla Hillyard

To pilot a Parent Speakers panel featuring parents whose children suffer from teen depression. Parents will share their experiences with other adults with the goal of eliminating teen suicides by reducing stigma about teen depression among adults and helping parents understand their role in diagnosis and treatment.

Food Link**\$2,700**

Sponsor: Donna Vanderclark

Food Link is a food rescue non-profit that uses the power of over 200 volunteers to collect and distribute food to 47 social service agencies in Eastern Massachusetts. Food Link partners with grocery stores, farms, and cafes to utilize high-quality foods that would otherwise be wasted. These funds will support our existing partnerships in Waltham with Chesterbrook Community Foundation, Costco, and Jewish Family and Children's Services, where we will continue rescuing food and providing free access to local agencies.

Greater Boston PFLAG**\$500**

Sponsor: Devin Shmueli

Educate and train the staff and board (all white) toward addressing cultural differences to a non-white population as we discuss LGBTQ issues. We believe the first step is to address our own racial preconceptions and misunderstandings before we can partner with congregations and organizations in non-white neighborhoods and communities.

Healthy Waltham**\$5,000**

Sponsor: Muffy Young

With the onset of the coronavirus, and at the request of Mayor McCarthy, Healthy Waltham is increasing food offerings from once a month to twice a month. Residents of Waltham--a community whose members are already among those most vulnerable--must overcome social isolation, the decrease of available resources, and the uncertainty of the future. COVID-19 has made accessibility to fresh food and needed toiletries for them even more difficult, and sometimes impossible. For this reason, Healthy Waltham is expanding its mobile-based pantry to serve those in greatest need. Healthy Waltham is projecting the increased Food Pantry service for five months, from April through August.

In Good Company**\$1,500**

Sponsor: Barry Stearns

"Radiance of the Day" is a new musical theater piece we are creating in collaboration with the Eureka Ensemble (eurekaensemble.org), whose social justice mission has helped inform the play. "Radiance" incorporates music from the cultures of many of today's immigrants as well as first-hand accounts of their challenges, and will demonstrate that people can unite for a common purpose, despite differences in culture and language.

Middlesex Human Service Agency**\$1,800**

Sponsor: Candace Holman

The MHSA Bristol Lodge Food Pantry provides free food to those in need every Wednesday. Food is provided by the Greater Boston Food Bank (GBFB) and private donations. GBFB would like MHSA to service more people and will increase our food delivery quantities. MHSA does not have enough shelving units to accommodate larger food deliveries. MHSA would like to install additional shelving, paint the food pantry and have electrical work done at the program.

(NAMI) National Alliance on Mental Illness - Newton/Wellesley Affiliate **\$300**

Sponsor: Scott Shurr

Produce critical situation cards and distribute to the community for people with mental health issues, their families and supporters. These cards will help understand crisis situations; what to do and whom to call for assistance in an emergency.

Opportunities for Inclusion **\$1,000**

Sponsor: Jon Taylor

We seek funding to continue and expand opportunities for individuals with intellectual and developmental disabilities, to volunteer in the Waltham community. Participating in service projects provides a sense of purpose, pride and accomplishment and builds connections in the community. Individuals with disabilities are not typically asked to give back, but are ready, able and eager to help others, with proper support. We will run a combined community service/social event and other service activities through our Recreation Program.

Waltham Boys and Girls Club **\$2,500**

Sponsor: Sue Genser

Working closely with the Waltham Public Schools and adhering to guidelines set forth by the Massachusetts Department of Elementary and Secondary Education and the Waltham Health Department, Boys & Girls Club staff are providing and distributing free "grab-and-go" meals curbside at several strategic locations throughout the city. This "no contact" model ensures safe delivery of this critical program - currently serving over 500 students a day.

Waltham Farmers Market **\$2,800**

Sponsor: Dan Taylor

SNAP funds are matched up to \$10.00 per week per customer to allow low income families access to fresh fruits and vegetables. Vendors are promptly reimbursed.

Waltham Fields **\$1,500**

Sponsor: Bill VanderClock

The Mobile Outreach Market (MOM) is a weekly subsidized farmstand-style market in Waltham from July-October. Located in the former Fitch school lot, it is designed to get fresh organic vegetables to households struggling to make ends meet. Customers take a share of vegetables and either pay \$5 in cash or with SNAP benefits, or get them for free with a voucher they receive from one of the 15+ partner organizations.

Waltham High School Show Choir **\$1,000**

Sponsor: Rachel Learned

We develop students' self-worth using discussion, lessons and performance. Paying for copyrighted songs will allow students access to a variety of high quality music. The Show Choir season is typically funded by the profit from an annual Eastern Show Choir Festival in April. This festival profits around \$17,000, and was canceled due to COVID-19. The WCPA created backup fundraisers to make-up some of this \$17,000, but due to the stay at home order we have not been able to implement new fundraisers.

Waltham Mills Artists Association **\$500**

Sponsor: Joel Weddig

Waltham Open Studios invites the public to visit art where it's made on November 7 and 8, 2020. The artists propose fresh ways to promote the weekend. Translating more event materials, revamping the web and mobile experience and advertising are three strategies for the 2020 event.

Waltham Partnership for Youth

\$1,000

Sponsor: Martha Creedon

This program strengthens the connection among a diverse cohort of organizations serving teens in Waltham. We meet monthly to advance Program Development and to strengthen our working relationship with each other so that we can better serve our teens.

Waltham Philharmonic Orchestra

\$500

Sponsor: Marianne Cutter

The Waltham Philharmonic Orchestra will continue to develop its Community Outreach Program to attract student players to the orchestra, host a Student Concerto Competition, offer an exceptional young musician or musicians the opportunity to perform as a soloist with the orchestra, partner with the Plympton Elementary School, and produce free chamber music performances for the community.

WATCH CDC

\$1,000

Sponsor: Deb Jose

The Immigrant Appreciation Night is an event aimed at increasing understanding of and appreciation for the contributions of the immigrant community in Waltham. The event - held at First Parish - is also designed to increase interaction between the immigrant population and the community at large.

<u>Total Distribution for 2020-2021</u>	<u>Total Distribution Since Inception (2010)</u>
22 Grants	182 Grants
\$ 35,000	41 Organizations
	\$ 297,062

Nominating Committee – 2021-22 Nominations

<p>Moderator <i>1 year (no limit)</i></p>	<p>Bill VanderClock</p>
<p>Nominating Committee <i>6 members, 2 years, (3 terms) selected by the Nominating Committee</i></p>	<p>Joyce Wilbourn</p>
	<p>Ace Gullotti</p>
	<p>Jacob Allen</p>
<p>President <i>2 years (2 terms)</i></p>	<p>Scott Tougas</p>
<p>Clerk <i>1 year (7 terms)</i></p>	<p>Kim Stratford</p>
<p>Treasurer <i>1 year (7 terms)</i></p>	<p>Janet Riley</p>
<p>Asst. Treasurer <i>1 year (7 terms)</i></p>	<p>Emily Weidman</p>
<p>Social Action Commissioner <i>2 years (2 terms)</i></p>	<p>Plum Kennard</p>
<p>Membership Commissioner <i>2 years (2 terms)</i></p>	<p>Pam Penton</p>
<p>Music/Worship Commissioner <i>2 years (2 terms)</i></p>	<p>Bethany Templeton</p>