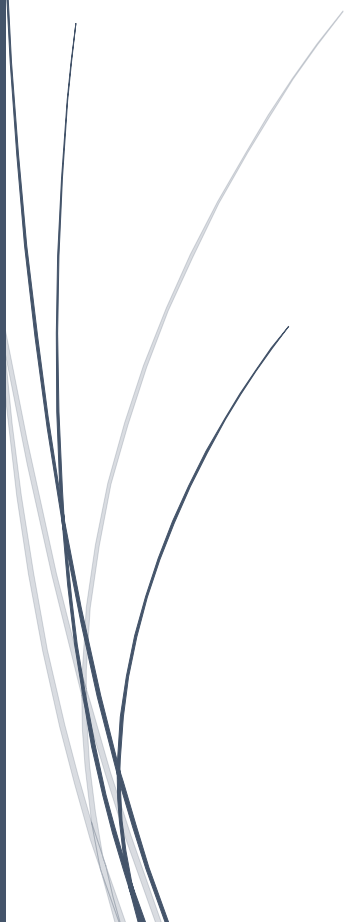


# Annual Report

2021-2022

First Parish in Waltham, Universalist Unitarian, Inc.





**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 take place in the sanctuary and via Zoom web conferencing on Sunday, June 12, 2022, at 12:00 noon 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 fiscal year beginning June 1, 2022.

**Article 4.** To vote to confer Minister Emeritus status to Reverend Marc Fredette.

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

By order of the Board of Managers, May 25, 2022.



---

Scott Tougas  
President

---

Kimberly Strafford  
Clerk

Posted May 28, 2022



*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

# Table of Contents

PRESIDENT AND STAFF REPORTS.....	1
PRESIDENT’S REPORT.....	1
ACTING MINISTER’S REPORT.....	3
REPORT FROM THE DIRECTOR OF COMMUNITY ENGAGEMENT.....	5
MUSIC AND CHOIR DIRECTOR’S REPORT.....	7
COMMISSIONER REPORTS.....	8
FINANCE COMMISSION.....	8
MEMBERSHIP INTEGRATION COMMISSION.....	9
MUSIC AND WORSHIP COMMISSION.....	10
PROPERTY COMMISSION.....	12
OUTREACH COMMISSION.....	14
COMMITTEE CHAIR REPORTS.....	17
COMMITTEE ON MINISTRY.....	17
COVID-19 RESPONSE TEAM.....	17
JONES PARTNERSHIP FUND COMMITTEE.....	19
NOMINATING COMMITTEE.....	19
PASTORAL CARE TEAM AND CARE CREW.....	20
PERSONNEL COMMITTEE.....	21
WORSHIP COMMITTEE.....	22
AUXILIARY ORGANIZATIONS.....	24
CLOTHING EXCHANGE.....	24
ACACIA IN KENYA.....	25
FINANCIAL AND REFERENCE DOCUMENTS.....	28
TREASURER’S REPORT.....	29
NOTES ABOUT THE PROPOSED BUDGET 2022-2023.....	31
PROPOSED BUDGET 2022-2023.....	34
INCOME AND EXPENSE STATEMENT, ACTUAL VS BUDGET.....	36
ASSISTANT TREASURER’S REPORT.....	39
TRUSTEES OF THE PERMANENT FUNDS REPORT.....	41
UU22T2 — DETAILED INVESTMENT RESULTS FOR THE LATEST YEAR.....	43
UU22T3 — CURRENT INVESTMENT PORTFOLIO BY CATEGORIES.....	44
UU22T4 — ANALYSIS OF THE NAMED FUNDS.....	45
GRAPH — PERMANENT FUNDS COMPARED TO CONSUMER PRICE INDEX.....	46
JONES PARTNERSHIP FUND GRANT RECIPIENTS 2021-2022.....	47
NOMINATING COMMITTEE – 2022-23 NOMINATIONS.....	49

## **PRESIDENT and STAFF REPORTS**

---

### **President's Report**

This year's board of managers consisted of:

Donna VanderClock – Finance Commissioner  
Dan Taylor – Property Commissioner  
Pam Penton – Membership Commissioner  
Bethany Templeton – Music and Worship Commissioner  
Plum Kennard – Community Outreach Commissioner

In addition, Kimberly Strafford served as Clerk, Janet Riley as Treasurer, Leslie Gildersleeve as Assistant Treasurer, and Bill VanderClock as Moderator. David Wilbourn, Joel Weddig, and Barry Stearns served as the Trustees of the Permanent Funds.

Did you ever wonder what a First Parish in Waltham service will look like in the future? Well, you don't have to wait. The pandemic has already pushed us there. It is a place with less more possibilities. With half the pews empty, yet higher attendance. With less handshakes, but more connection. Less travel, but more accessible meetings. In short, it is a good place to be!

Summarizing this year is not an easy thing. Nothing was normal, and nothing stayed the same for very long. Typically, the president's report would give a general summary of the board's goals for the year and our efforts to meet them. This year, however, we spent much of our time responding to our constantly changing world, so this is more of a narrative.

The summer saw very little activity in the church building except for those working on the building. Along with the painters, there was a small crew of volunteers, including Dan DeHainaut, Janet Riley, and myself installing an audio/video system in the sanctuary. In anticipation of bringing parishioners back to the sanctuary in the fall, a Reopening Committee met regularly to work through the details of meeting in person while not spreading the Covid virus.

Our Interim minister, Reverend Frieda Gillespie, joined us in August. She was supported by the Transition Team of Bee Fortin, Dan DeHainaut, Dimitry Zarky, Jodi Anderson, and Marianne Cutter. Her first service was our homecoming service. Unfortunately, there wasn't much of a "homecoming". Because of another surge in Covid-19, it was decided that we still needed to keep our distance. However, we did get to put the new AV system to the test. Services were run from the sanctuary with most people participating from home. Although the system needed many tweaks, it worked well to capture the sights and sounds of our services and to allow people at home to be seen and heard in the sanctuary. All that said, for those of us who did get to be in the sanctuary, it was clear that there was nothing like home. Also it was not easy for a new minister to feel inspired when speaking to an almost empty room. This year's board retreat was done over Zoom web conferencing. Typically the board will come out of the retreat with a set of specific goals, but this year it pretty much came down to one thing. We need to *reconnect, in person*. The following theme was presented to the congregation:

We hope that all members of this congregation find inspiration in these words, and that you will lead with us in this year's theme of:

### ***Reconnecting!***

Recognizing the physical, mental, and spiritual drain that the pandemic has had on all, the First Parish in Waltham board of managers has set a theme for this year of *Reconnecting* with a goal to:

- Make this year a period of healing, joy, and rebirth.

- Rekindle the caring and love that we have for one another.
- Have dreams together and make them happen.
- Consider our connections to those in our past, present, and those yet to come.

To this end, the board will strive to initiate and support:

- Activities that bring people together in person in as many ways as possible.
- The creation of systems for improving pastoral care.
- The development of policies/covenants/tools for ensuring right relations.
- Activities which deepen our understanding of who we are and where we want to go, especially as we transition to a new settled minister.
- A welcoming environment to all, whether inside or outside our walls.

It had become clear that being apart was hard on most people, and especially hard on some, like our youth or those who lived alone. In October, families were invited to participate in worship services, and Devin started providing religious education, meeting outdoors when possible.

On November 14th, we opened our doors to in person worship. Through work of the Covid Response Team, the Reopening Team, and the worship leaders, we welcomed anyone who was vaccinated and willing to follow precautions including masking and distancing. This went a long way toward our goal of reconnecting. There were also many new faces, including many from Chaplains on the way, and this added to the sense of rebirth and healing.

Throughout the fall, there was a sense that we weren't getting what we expected from Reverend Frieda. With any new minister, there will always be a period of adjustment and acceptance. In this case, however, it looked like there were other difficulties making it hard for Frieda to provide the leadership and structure that were so desperately needed. Frieda herself agreed that she was having a hard time keeping up. In December we negotiated a resignation, and once again, we were in a time of change. On top of that, a new Covid surge convinced us to close the doors to the sanctuary again, starting with the Christmas Eve service.

In January, Reverend Becky stepped up to become our acting minister. We also bid farewell to our office manager of six years, Chris Johnson, and welcomed Jess Acosta as our new office manager. Once again, we found ourselves adjusting to so many changes. In March, we returned to having in person services. Becky's strengths have always been in preaching and pastoral care. This, along with her years of experience with us brought a sense of stability and comfort to our services.

The board decided that we should again look for an interim minister for a two year term. We wanted to take the time to do the interim process thoughtfully and thoroughly. An interim search committee was formed that included Marty Ahrens, Nancy Carniglia, Pam Penton, and myself. Building on the work done the previous year, we submitted a well crafted congregational record and presented ourselves well in interviews with five candidates. Unfortunately, the stress of the pandemic caused many ministers to retire. Over forty churches were looking for an interim minister. In the end, matches were made with only half the churches, and we were not among them. During this time, Jess also resigned from the office.

As I write this, we are still waiting in hopes that we can find a part time minister. Reverend Becky has agreed to work twenty hours a week with us next year. Our hopes are that we can find a part time minister who can help with staff oversight, lead interim activities and provide an outside view. The UUA is trying to get ministers to come out of retirement to help churches like ours. We are hopeful that our clear and limited needs will be attractive. And even though our interviews did not result in an interim minister, two of them expressed interest in applying to be our settled minister in the future, so we do look

attractive.

In a place like First Parish in Waltham, there are always too many people to thank. That said, I would like to offer deep appreciation to our staff who have stuck with us through these trying times:

Devin Shmueli, our director of Community Engagement, who has brought boundless creativity to religious education and has filled in many cracks, including the leading of worship.

Emma Campbell, our Music Director, who has warmed so many hearts with her deep well of positive energy, her conscientious organization, and of course, her moving music.

Richard Farina, our groundskeeper, for his quiet yet consistent work

Reverend Becky - for her joyous spirit, thoughtful and fun morning messages, and willingness to openly model what it means to be a caring human being.

This was an extraordinary and often difficult year, but I do think that we have risen to our goal of reconnecting. As we gather now in the sanctuary, we are greeted not just by the smiling faces of those next to us, but by the faces and voices of remote attendees. They join us from near and far, and from back yards and rehabilitation beds. We continue to attract new faces, and I am confident that we will be an important part of Waltham for many years to come.

Respectfully submitted



Scott W. Tougas  
President

## **Acting Minister's Report**

Beloved First Parish Community,

What a year we have had together! Together, we have found our way through several staffing transitions, the undulations of COVID numbers and the mysteries of hybrid worship. We've had many wonderful worship services with guest musicians or guest ministers. We've cared for ourselves and each other, and we've cared for our community and the world around us. All of this through gifts of time, talent and treasure.

### **Staffing Transitions**

I won't go over the specifics of these job changes, as I assume they are including elsewhere in this annual report. But I do want to emphasize what that experience might have taught us.

The biggest lesson might be that FPW is a resilient and faith-filled congregation. COVID taught us that a church is not a building. The year has taught us that a church is not its staff or ministers. Your staff and ministers will come and go; they have for over three hundred years now. But it's the congregation that keeps the parish going, month to month, year to year and century to century. The congregation's commitment to the each other, to our local community, and to a larger Unitarian Universalist presence in the world has not wavered this year...despite those staffing transitions.

Another thing we have learned is that the accumulative effect of doing ministry during COVID, just like healthcare and many other "helping professions," has gotten so exhausting that many ministers are retiring or taking time off. Hence it has been difficult to fill our new interim minister position. But, again, with creativity and perseverance, the personnel committee and board are envisioning new possibilities and you can rest assured there will have ministerial leadership in the fall.



I started this church year as your part-time community minister, as I have been for seven years. And I am ending it as your fulltime Acting Minister. Next year, I look forward to a new, half-time role as your Acting Minister of worship and pastoral care.

### **Parish Volunteers in Leadership**

Lay leadership has become even more essential to our congregational polity during COVID, and this year was no exception. The board of managers, the pastoral care team, the IT teams, the finance committee, the Covid Response team, the membership committee, and so many others...First Parish could not run without the volunteers who make up these committee and those who step forward to lead them. My role as minister is less about attending meetings or giving advice, (*though I do*), as it is to stay connected to their goals and be available for support. I've been amazed at how, like glue, their hard work holds the community together.

It's common to see the same people stepping forward to volunteer, in any church, especially for roles of leadership. It's a problem that burns out those volunteers. Our church is no exception. Fortunately, after much recruiting, new volunteers stepped forward this year to learn about the technology that allows us to stay hybrid and connected. We will need more folks to step forward in this and other areas next year so that every parishioner gets a chance for spiritual renewal.

### **Worship**

We have created some beautiful, comforting and challenging (*because we need both!*), worship services together this year! Many of you have emailed myself, Emma or Devin to tell us that!

We were lucky to have our DCE, Devin Shmueli, lead very meaningful worship on several occasions, as well as his weekly message for all ages. The congregation seems to enjoy the return of that weekly message and we plan to continue it in the future.

Our music, under the direction of Emma Campbell, has been innovative and wonderful. Music Sunday was just a creative blessing this year, as we were so happy to see the choir together. One congregant told me the music during our services, lifts and comforts her all week!

My own writing for worship has taken up a much larger portion of my week this year. Mostly because I've been doing so much more of it, than I'd done previously as a community minister. But I've enjoyed that challenge and have written sermons on topics I could never have imagined last year! It's been important to me that our worship has a familiar template, with rituals that are understood and respected. But that it still includes creativity and some surprises within that structure.

This year we added a new way to include personal prayer from both the sanctuary and from Zoom chat. We've also added "The Morning Wave" during our welcome so that the folks on Zoom and the folks in the sanctuary, can feel connected to each other. Finding other ways to make the Zoom experience feel more inclusive, is a continuing goal for worship planners.

### **Pastoral Care**

Most of the day to day pastoral care needs have been lovingly and faithfully organized and carried out by Daphne Blount and the other volunteers on the Pastoral Care team this year. This is another area of lay leadership which will need more people stepping up next year. Lay pastoral care, whether in the form of doing or just listening, is one of the best ways to give and receive love in a congregation. We do that will at FPW. But we need someone new to step forward to organize our efforts.

My opportunities to offer pastoral care increased as the year progressed. The isolation of COVID, especially for our those among us who have extra vulnerabilities so that they cannot be in public, calls for more one-on one time. I've done that with regular zoom visits, visits in the office, or, when the weather is sunny, with tea and folding chairs in front of the sanctuary.

A number of congregants are struggling with physical and mental health issues this year. One of our beloveds has entered hospice as I write this. This congregation is seriously empathetic in responding to those struggles and feelings of loss and that inspires me as I show up to those situations myself.

In conclusion, I've been grateful to accompany you through it all this year. Your perseverance and optimistic spirits have inspired my own. We have done "Good Church" together and I'm looking forward to continuing that, and growing with you next year.

May your summer be restful and fun!  
May all people be so blessed,  
Rev. Becky Sheble-Hall

## **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. I have requested that we include it in the budget for 2022-2023 under Teaching Staff. The religious education committee will recruit for this role over the next couple of weeks.

**Friendship Finders:** Last year, we wrapped up the church year and continued to maintain the container garden until our educator, Brad Baker, brought the container garden back to his property. The families were unable to commit to giving it the care it needed in July and August. We were able to share some flowers at the June 20th Flower Communion and at the start of this church year at Homecoming Sunday. Last June, we met at Temple Beth Israel with Rabbi David Finkelstein. He showed everyone the Torah and taught a few other Jewish concepts, and the kids enjoyed asking a number of questions. This was intended to dovetail into this new 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 worked with other clergy and in September and October we visited the Lutheran church and heard from Rev. Matt Carriker who serves Agape which meets at First Parish. Last summer, a large part of my time was spent planning for this coming year.

In 2021, prior to reopening, I started the new church year where we left off and continue to think about who we are (Unitarian Universalists) and who are our neighbors (Religious and Community at large). I worked with other clergy to get them to share something of their traditions and communities with our Friendship Finders. I spent a large part of my time this summer planning for these sessions and making plans with other houses of worship.

We were initially limited our indoor offerings, our programming will be as follows:

Second Sunday: Outdoor Family Fun Days

Third Sunday: Friendship Finders Online or Outdoors

Fifth Sundays: All Ages Program Online or Outdoors

When we gathered in person again, we had Friendship Finders weekly save for All Ages Services. We also celebrated the very new work of recruiting ten new adults to join Friendship Finders as volunteers. These folks will be recognized on June 12, 2022 for Religious Education Sunday!

### **Friendship Finders Family Notes:**

Last June, in preparation for this church year, I met with parents to discuss how things have been going during the pandemic, what they hope to see in the coming year, and I wanted to gather input on how we might create new processes for RE@FPW. I also met 1:1 with parents to see how kids are doing and to keep in touch with them

We had our first Family Fun Day on Sunday, August 15th. We met at Beaverbrook Park and the kids had a lot of fun while the adults had the opportunity to catch up. Through the rest of the we visited Gore Estate, DeCordova, visited Rev. Becky's Farm, and several on-site activities.

**Spirit Spark:** We had Spirit Spark with Regie on Oct. 31, November 28th, Jan. 23, Feb. 27, Mar. 27. We had Spirit Spark with Artist Ann Miller for Open Studios Thursdays, January 27th and February 10th. These were well attended.

**Adults:** In the Fall, I taught a class on Transcendentalism Through A Jewish Lens which we transitioned to Exploring UU Theology in the Spring We also had offerings like JT Turner's A Christmas Carol which was poorly attended but a lovely offering.

**Support of the Committees/Commissions and Ministries of First Parish** This church year, I supported many of the Social Action Teams activities, including building a bridge between First Parish and Temple Beth Israel. They were successful in their programming on Anti-Semitism. They did awesome.

I also attended several Membership Committee Meetings, reinstated a religious education committee, and worked with the nominating committee to identify a new Religious Education Commissioner.

**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. And I am now serving as Communications and Membership Chair for New England LREDA!

**Ritual** I preached and led worship several times this year.

**Zoom/COVID Support** I supported the COVID Response Team, attended Board meetings, and the Reopening Committee until we returned in person, at which time I needed to focus on weekly Friendship Finders again.

**Social Media** I supported an increased Facebook presence

Thank you for making this another year of resilience and hope.

Respectfully Submitted,  
Devin Shmueli  
Director of Community Engagement

## **Music and Choir Director's Report**

### **Choir**

The Choir has continued to rehearse – both online and in person. We were very fortunate that both the Response Team and the Re-opening Team were able to help navigate the scientific studies available, and ensure that Whitcomb Hall was a safe place for us to rehearse in if certain precautions were taken. The choir has also returned to performing in person, and it was with great joy that I directed them for Music Sunday. Moving it to May this year proved to be a thoughtful choice.

### **Music Committee**

It has been a real pleasure to feel supported by a group of enthusiastic congregants. The Music Committee has only just started meeting on a monthly basis, but the combined passions and interests should help grow the Music Program in directions that meet the needs and wishes of everyone at First Parish. The team was put together by Bethany Templeton Klem (Music and Worship Advisor) and she is joined by Peter Babi, Katie Gullotti, Gary Madison, and Scott Shurr.

### **Instruments**

It has been wonderful to play the re-conditioned Steinway in the church again, and to have it used for external events. Hearing the congregation sing hymns again has moved me to tears on occasion and I have hoped that this has not been noticeable. The cover that was purchased has helped the piano to stay more in tune, and protect it from further cosmetic damage.

The organ is not in good shape, and I have been working alongside a local repairer and tuner to acquire a detailed list of repairs needed. I will be handing over responsibility for the management of this project to the Music Committee as their focus for the next church year.

### **Guest Performers**

It has been wonderful to be able to enjoy music from guest performers again, and I really hope to be able to build this into a regular part of worship in the next church year. We have been joined by a local pianist, a trumpeter for our Easter service, and in May we were joined by a cellist (who had to be linked in via Zoom due to Covid). One Sunday we also had the pleasure of watching Nozama Dance Collective – a group who had been intending to provide a workshop for members of First Parish to take part in for International Womens' Week. Unfortunately, it had to be postponed as worship moved back online, but I hope to be able to offer it next year.

Church members have also shared their talents and I sincerely hope they will continue to do so next year.

### **Other business**

I have successfully completed my first year's studying towards the UU 'Music Leadership Certification Program', and I have enjoyed sharing the knowledge gained with various different committees at the church. Modules completed include: Developing and Maintaining a Music Program, Preemptive Radical Inclusion, and courses on the relationship between Music and Worship, and how to use music as a pathway for building an anti-racist, anti-oppressive congregational culture. I am very grateful to First Parish for supporting my involvement with this program. It has enabled me to connect with other Music Directors across the country as well as become involved with a network of other Music Directors working in UU churches in the local area.

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 unforeseen circumstances such as the pandemic without drawing an unusual amount from our endowment, good news for our long-term financial health.

### **FY 2022 Results**

#### **Income –**

- We collected 102% of our budgeted income for Pledges.
- The Clothing Exchange contributed 180% of what they had committed.
- Facility use fees or Rentals recovered from last fiscal year's 42% to 88% of budget, with the building back open for most of the year.
- Gifts and Offerings were 50% of the budgeted amount, which includes a small contribution from the 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 \$3,433 this year to 6 local organizations in the "Share the Plate" program.
- Thanks to the generosity of members and friends, we exceeded our fundraising goal this year, raising \$8,302 or 104% of what was budgeted. Fundraising events this year included: 1) a chili cook-off lunch; 2) an online holiday marketplace; and 3) an online service auction with a talent show.

#### **Expenses**

Personnel expenses were less than budgeted because of unexpected changes in staff and unfilled positions. Unspent property funds have been added to the FY 2023 budget for repair of the exterior chapel steps. Overall, we had a budget surplus of over \$29,000, which will be added to our reserve funds to protect from future unforeseen circumstances and possibly be used for one-time building projects.

### **FY 2023 Budget**

The Finance Committee has developed and will present to the congregation for approval a budget that totals \$325,916, an increase of 5.4% over the FY 2022 budget.

Personnel costs and property maintenance together account for 85% of the budget. Commission budgets represent about 9%. For non-endowment, non-pledge income, we are planning as follows: Rentals, \$50,000; Gifts and Offerings, \$8,000; Fundraising, \$9,000; Clothing Exchange, \$5,500; proceeds from the sale of an updated FPW History Book, \$2,250; an annual grant of \$900; together these add up to \$75,650. So, now we need to fund  $\$325,916 - 75,650 = \$250,266$ . 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 2023, these three items need to add up to \$250,266. 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, \$124,000; Endowment, \$112,000; Prior year surplus, \$14,266.

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 (currently 105) and thus (we hope) pledge income, and reduce the dollar amount of the endowment draw each year. Our FY 2023 total endowment draw (including both restricted and unrestricted funds) will be \$112,000, compared to \$113,000 for FY 2022, a reduction of \$1,000. The endowment total as of the end of the trustees' fiscal year (2/28/2022) was \$2,315,550, so the FY 2023 endowment draw 4.8%. This is good news, and our challenge will be maintaining that sustainable level in the future.

### **Acknowledgements**

Many thanks to Daphne Blount, who conceived of and organized the chili cook-off lunch in September; Joan Smith, Leslie Gildersleeve, and the many donors and purchasers of items in the holiday marketplace; Auction Committee members Leslie Gildersleeve and Joan Smith, and all the members and friends who donated and purchased items and services in the online auction. Thanks again to Daphne Blount for organizing the talent show, as well as all the wonderful performers; to Kimberly Strafford for serving as our emcee; and Elisse Ghitelman for handling all the zoom logistics. The talent show helped to make the evening another smashing success! Finally, thanks to cookie bakers Joan Smith, Dan Taylor, Leslie Gildersleeve, and Janet Riley for cookies given to members who submitted their FY 2023 pledges early and with an increase.

Leslie Gildersleeve deserves special mention in this report for her long and capable tenure as Assistant Treasurer. Leslie is finishing up 8 years in this trusted position, a job that requires weekly attention, confidentiality and tact. Not only that, but she is a valuable member of the fundraising branch of the Finance Committee, making and recruiting items for both the holiday marketplace and the online auction. We are grateful that she will continue in this role!

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 of the Permanent Funds

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 third year as commissioner and as we all know, the pandemic has continued to affect our church-life. This continues to create many challenges for the committee as we attempt to keep connections with members and attract new members. One of our focuses is to think about how to integrate the young families into our weekly activities. This continues to be challenging. The committee has been working closely with the Covid Response team and the Reopening team. This year's committee members are Elisse Ghitelman, Marianne Cutter, Nancy Lawrence, Martha Gallagher, Cynthia Salamanis, Sue Genser, and Kris DiNardo.

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

Newcomers - The few visitors we have had at our zoom services have been recorded in the weekly attendance. As visitors request access from the Office Manager, their information is sent to Marianne Cutter and she makes the welcoming connections. As we reopened twice, the committee has created systems that account for all in person attendance and on zoom. During the second reopening, we have experienced a small flow of visitors.

Coffee Hour- The committee has created some safe opportunities for in person time together. Coffee and tea have been all that has been offered to this point until we offered “Nibbles” after Music Sunday. This has been a success. Zoom Coffee Hour continues and Sue Genser has provided a laptop for the in person attendees to communicate with the zoomers.

Breakfast Program- Working with Chaplains on the Way, the committee continues to offer support with the signup genius for food needs, newsletter articles of other needs and communicates to the Board and other commissions. The Breakfast Program has again transitioned its services to the needs of the community it serves. It has been five mornings in the middle of the winter and leadership and spirituality. As we reopen, there has been a group from the Morning Program who have joined us on Sunday.

Birthday Cards- The committee developed a list of members’ 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 in 2021. A small subcommittee has begun to work with Social Justice members to work toward a congregational vote next year.

Ferry Beach - After two years, we are going to Ferry Beach. Our committee is supporting activities for the weekend while Sue Genser works on registration.

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 programing. Previously, there was a commissioner to support this group but there has been no commissioner for a few years. There will finally be a Commissioner for the coming year and the RE Committee has met during the spring to begin creating a support system for the adult and youth programs.

Respectfully submitted  
Pam Penton, Commissioner

## **Music and Worship Commission**

The past year has felt like an exercise in being a turtle: stretching out our heads to look around and see the world, only to dart back into our shells to protect ourselves (and each other). We’re thankfully in a phase where we feel confident occupying a hybrid space for worship each week, and it’s been nice to feel that metaphorical sun on our faces.

Services this year have been led by many worship leaders, including:

- Rev. Frieda Gillespie
- Rev. Rebecca Sheble-Hall
- Devin Shmueli
- Rev. Jo Murphy

- Reggie O’Hare-Gibson
- And members of the Worship Committee

In some part, the variety of worship leaders wasn’t planned. Rev. Frieda led fewer services than the church originally anticipated, and Rev. Becky stepped up to deliver many more sermons than she expected when the church year first began. Devin, too, climbed the steps to the pulpit several times to deliver a morning message—including a memorable sermon about Star Wars, courtesy of his service auction promise to lead a service on the topic of choice from the winning bidder!

### **Music**

Emma’s Music Leaders Certification Program (MLCP) is continuing on track, with AUUMM conference attendance anticipated this summer. Many good conversations have come from Emma’s program work, including discussions about the budget, the ways in which her hours can (and cannot) stretch to accommodate her weekly tasks, and opportunities to expand First Parish’s music program to welcome a wider circle of participants.

As part of the MLCP, Emma has spurred the revival of the dormant Music Committee. This year’s members:

- Katie Gullotti
- Scott Shurr
- Peter Babi
- Gary Madison

Emma and I have both been attending meetings to get the group started on projects and ready for the upcoming year. The first two meetings delved into the tricky task of removing the two broken pianos in Whitcomb Hall. Both pianos have cracked soundboards that won’t sustain tuning, and one boasts a mouse nest. The second project for the tail end of this church year will be getting the choir’s music library into good working order with a new database to manage inventory and facilitate easy searching.

Other elements of the music program included a small but enriching set of guest musicians during services and the return of in-person rehearsals for the choir. Emma presented the Response and Reopening Teams with excellent information about rehearsal safety that has enabled the group to continue rehearsing together at the church whenever the church is offering in-person services, and the choir was delighted to offer a “round the world” tour of songs for the first Music Sunday (5/22) in the sanctuary since 2019.

Speaking of singing, the return of full-voiced, congregational hymn singing has been a balm for the soul this spring! Many thanks to everyone who looked at the data, considered ventilation, and chose to bring the joy of shared music back to the services.

### **Worship**

The Worship Committee remains a strong and vibrant group with a commitment to thoughtfully planned, lay-led services. The committee has led 6 services this year:

- Samhain on October 31, 2021
- Solstice on December 21, 2021
- “The Hard Work of Hope” on January 9, 2022, featuring an original song composed and performed by Michael Carmody
- An exploration of the 5th principle on March 27, 2022
- Beltane on May 1, 2022
- and their annual poetry service on June 5th, 2022.



It has been a pleasure to get a peek at the inner workings of the Worship Committee. While my schedule hasn't allowed me to attend their meetings, the email exchanges have been filled with clear and open communication, camaraderie, and a sincere willingness to listen to and accommodate each other—even when challenges and frustrations arise.

Worship Committee members and participants this year:

- Michael Carmody (chair)
- Sue Genser
- Karen Klein
- Daphne Blount
- Marty Ahrens
- Gary Madison
- Pam Penton
- with support from Jacob Allen

Other aspects of the commission's responsibility to support the worship services have been less successful this year. I did not do a good job of relaunching either the flower dedications for the altar or the volunteers for church mice. KJ graciously and capably took on much of the church mousing for most of the in-person year, but it's too much to ask one person to fill that role every week. Both the church mice and the altar flowers will get much more attention and structure in the coming church year. (Be on the lookout for volunteer requests over the summer!)

Respectfully submitted,  
Bethany Klem  
Commissioner

## Property Commission

<p>General Comments:</p>	<p>We started out this church year with a nice new painted sanctuary, new efficient light bulbs installed in the chandeliers, and a spiffy new Projector and Camera system for bringing the internet into our sanctuary. If we couldn't all be in the sanctuary in person, at least we could bring the sanctuary into our homes via Zoom. There were no major property issues throughout this year, but lots of smaller things kept us quite busy. Thanks to all who helped keep our building and grounds in good shape, but thanks in particular to Barry Stearns who continues to be the lead member of the Property Committee (which I hope to enlarge in the upcoming year - get ready to be recruited!). All in all, it is great to be back in the church using it with some degree of normalcy.</p>
<p>Activities over the past year</p>	<p><u>Projectors/Cameras in Sanctuary:</u> Thanks to the incredibly hard work and leadership of Scott Tougas and Dan DeHainaut, we installed projectors that can bring the internet to the walls of our sanctuary and cameras that can bring the sanctuary into our homes. This allowed for very successful hybrid services and when necessary entirely online services. In the long run this may also make the sanctuary more attractive to renters who may want to take advantage of this technology (for an additional fee of course).</p> <p><u>Major Maintenance/Restorations:</u> We do have several major projects that need to be taken care of and we started on some of them.</p> <ul style="list-style-type: none"> <li>● Our rubber roofs need maintenance and replacement. The rubber over</li> </ul>

Whitcomb Hall needed some minor patching and sealing. After a false start with a scam contractor, we hired a real roofer and had this taken care of during a warm spell in January. The rubber roof around the steeple will need to be completely redone and hope to take care of that over the summer break.

- Our steeple also needs to be restored through painting. This is a large job and we'll need to figure out how to fit it in the budget and will investigate other ways to cover the costs.
- The stairs up to the chapel collapsed over the winter. It turns out that certain ice melt products eat away at the mortar used in our pathways and stairs. We will use different ice melt products in the future. We have hired a mason to fix this and some other more minor masonry issues. That work should be completed in early summer.

Minor Maintenance/Repairs: There were several small repairs over the past year which include a new light fixture in the women's restroom, some minor painting and window repairs, maintaining the parking stripes in the parking lots, fixing the noise of the exhaust fan in Whitcomb Hall, rehanging the Black Lives Matter banner a couple of times which can take a beating in a wind storm (it's put up in a lower position in hopes the wind will be less of a factor), fixing the front doorbell, fixing pump problem with our gas furnace, some minor plumbing issues in the kitchen.

Chaplains on The Way Morning Program: The CoTW continued to sponsor a morning breakfast/warming program for our neighbors experiencing homelessness in Waltham. This program was successful, though there were some issues that needed to be addressed with regards to the interaction with our neighbors and with the Waltham Day Care Center which is housed in our building (and was founded by First Parishioners). CoTW made efforts to address all concerns.

Rats: Waltham is experiencing a resurgence of the rat population and this includes around First Parish and it was particularly noted by our neighbors that rats were getting into our dumpster. We have put out rat bait traps and replaced our dumpster with a more secure one that hopefully will ease the problem. We will have to constantly reevaluate as time goes on.

Grounds: Leslie Gildersleeve & Amy Eastwood kept our grounds in excellent condition. We had a successful Stewardship day which brought out about 25 people to help with little chores and landscaping tasks around the building. One of our large trees appears to be ill. We will need to bring in a tree doctor (arborist) to evaluate it.

Security: We have had some security lapses over the past year, none of which has resulted in any serious problems, but they should remind us all to be more aware when we are using our building. Many times the front doors of the sanctuary were left improperly secured so that it was easy to open them and walk right into the building. I have taken some measures to make it harder to leave the door improperly secured. Several times sanctuary windows have been left unlocked. It is very easy to open these windows and climb into the sanctuary. It is important that whoever is involved with opening windows and closing them be sure that they are locked after they are closed. One window was left open in the Clothing Exchange room and someone discovered it and broke in. We are fortunate that no serious damage or theft resulted. The break-in was recorded by a security camera. It is our goal over the next year to add some more such security cameras around the building.

	<p><u>Keys:</u> We have not rekeyed the building for more than 20 years. There are many copies of our keys out in the world and it is good practice to change the keys every so often so not as many random people have keys to the building. I talked with a representative with Sherman Lock and I hope to get the whole building rekeyed over the next year. We are also looking into getting a card system for the front door which would give us more flexibility and would remove the need to give keys to renters. This project is more expensive and it may have to wait until it fits within our budget. In the mean time, we are rekeying the church office so it is more secure.</p>
IT Comm Report	<p>IT Committee, Ongoing Projects, September 2020:</p> <ul style="list-style-type: none"> <li>● Projectors &amp; Cameras in the sanctuary - very successful. Several folks have been trained to operate the cameras and the sound system.</li> <li>● Bill VanderClock has maintained and responded to WiFi issues throughout the year. Thank you, Bill.</li> </ul>
Upcoming Activities/Issues:	<ul style="list-style-type: none"> <li>● Rekeying Building;</li> <li>● New rubber roof around steeple;</li> <li>● Stairs and other masonry work;</li> <li>● Repairs to women’s room stalls;</li> <li>● Arborist evaluation of tulip tree;</li> <li>● Security cameras;</li> <li>● Steeple painting (probably at least a year away).</li> </ul>

Respectfully submitted,  
 Dan Taylor  
 Property Commissioner

**Outreach Commission**

The umbrella of “Community Outreach” covers a number of interesting groups & projects.

**8th Principle**

A subcommittee to study, understand & promote adoption of the 8th Principle at FPW was formed in the spring of 2022. Unitarian Universalism is founded on 7 Principles. In 2013 Paula Cole Jones proposed an 8th Principle. It reads as follows:

“We, the member congregations of the Unitarian Universalist Association, covenant to affirm and promote: journeying toward spiritual wholeness by working to build a diverse multicultural Beloved Community by our actions that accountability dismantle racism and other oppressions in ourselves and our institutions.”

First Parish in Waltham has been considering taking action on this for a couple years. In the meantime the number of churches which have adopted the 8th Principle has risen tremendously. The numbers went up from 32 in August 2020, to 155 in March 2022. The committee would like to get Paula Cole Jones to come to FPW to aid in the adoption.

### **FPW-TBI Combating Antisemitism Collaboration**

In the fall of 2021, First Parish in Waltham and Temple Beth Israel of Waltham began a collaboration (on zoom) to talk about antisemitism and how we could work together to fight it. This was inspired by a webinar featuring Dr. Lipstadt, “a renowned scholar of the Holocaust and modern antisemitism,” In the summer of 2021 she was nominated by President Biden to be *Special Envoy to Monitor and Combat Antisemitism*, a position with the rank of Ambassador. Dr. Lipstadt’s confirmation finally happened at the end of March 2022.

The formation of the FPW-TBI collaboration came about because of Devin Shmueli, Director of Community Engagement. Linda Ungerleider of TBI and Candace Holman of FPW have been the leaders, with participation by other members of both congregations. The committee quickly came to the conclusion that it could and should host zoom seminars. The first one was March 22, 2022 and the second one will be May 10, 2022. Session #1 was well attended by both FPW & TBI members. The entire process has been consuming & revelatory. Our two congregations have formed a bond.

### **COTW “Morning Hours” program**

From November 2021 through April 2022, FPW once again hosted the COTW (Chaplains On The Way) “Morning Hours” program. As she did last year, Pam “The Cookie Lady” Penton created a “Signup Genius” link for folks to volunteer to cook and/or serve breakfast casseroles, provide ground coffee, fruit, muffins, juices etc. FPW members, other local churches & Waltham residents all pitched in. Five days a week (M-F) 7:30 - 10:30am our unhoused friends were welcomed to delicious, hot breakfasts served with love and respect.

Guests had lots of choices, a powerful thing for those not usually provided with options. Volunteers were able to form connections with folks they wouldn’t ordinarily have much contact with; they learned the guests’ names and food preferences. A lot of merriment & laughter was enjoyed. Our bathrooms, critical when nearly every public bathroom in Waltham was closed because of COVID-19, were much appreciated. All of this took place in our warm & comfortable Whitcomb Hall.

### **Temple Beth Israel “Warming Center”**

In the fall of 2021, Linda Ungerleider, the Social Justice Committee Chair of Temple Beth Israel, asked if TBI could host a “Warming Center” in Whitcomb Hall every Sunday afternoon, a time of week when few services are available for those in need. As Linda wrote, “In the Jewish tradition, we are tasked with Tikkun Olam, healing/repairing the world.” We Unitarian Universalists also understand how important it is to live our faith. TBI had conducted this program on site in the winter of 2020 - 2021. Though it was whole-heartedly supported by the congregation, it was not well attended because other options were available to our unhoused community. Those resources ended in April 2021.

We welcomed this exciting opportunity to be more closely connected with the Temple Beth Israel congregation. The tremendous work TBI had already done segued beautifully with FPW’s “COVID Response Team” protocols. All the wholesome vegetarian food was cooked in Temple Beth Israel’s kitchens by “Food Not Bombs” and brought over to Whitcomb Hall.

The “Warming Center” program was very well received & we hope they will return to FPW in the 2022-2023 winter season.

### **2021 Holiday Dinner**

Thanks to the Social Action Team Chair, Candace Holman, we were able to host a festive Holiday Dinner for our unhoused friends in Whitcomb Hall on Christmas Eve, December 24th, 2021. COVID-19 was a huge factor for any gathering at that time. Candace put tremendous effort into organizing every detail of this event to make sure it would be welcoming, warm and safe. The event was approved by the FPW Covid Response Team. In the past, FPW members were invited to share this meal, but that was not possible this time. The congregation united beautifully to make this event delicious, fun and memorable.

Whitcomb Hall was festively decorated & there were little gifts for all the attendees. We're a community which loves to share; it was great to finally have a chance to do that.

### **Equity & Justice For All Study Group**

This group met only a few times during the 2021 - 2022 church year. The Waltham Public Library has been a great resource with their "Year Of Black History" program with many zoom seminars with special guests. Members of Equity & Justice For All watched some of the videos and had great discussions.

### **Worth mentioning**

In 2021 - 2022, because of the pandemic, we were NOT able to:

Collect Christmas gifts for the Giving Tree 2021; they took online donations of money only.

Hold any Waltham Connect events in 2021 or 2022.

Have a community event to celebrate Juneteenth, now a National Holiday.

Though First Parish in Waltham was closed for nearly two years, we have recently resumed services in the Sanctuary. In spite of our long separation, evidence shows that the FPW community has remained strong.

Respectfully submitted

Plum Kennard, Community Outreach Commissioner

## **COMMITTEE CHAIR REPORTS**

---

### **Committee on Ministry**

Our group started out this fall as Reverend Frieda Gillespie's Transition Team. We learned the beginning steps an Interim Minister takes to guide a congregation through the transition to a settled minister. We held several cottage meetings where Rev. Frieda led reflective discussions on our church's present and future.

When Rev. Frieda left, we were all given the option to be on Rev. Becky's Committee on Ministry. Every one of us said yes! The Committee on Ministry is here to support and guide Rev. Becky in all aspects of her work, as well as be a sounding board for sensitive or challenging situations that arise in the FPW community. Our conversations are confidential.

We are so lucky to have Rev. Becky step into the unexpected role of Acting Minister. Not only does she already know and love us, she is fiercely committed to the well-being of the congregation and to her own growth and learning.

Respectfully yours,  
Bee Fortin, Chair  
Jodi Anderson  
Marianne Cutter  
Dan DeHainaut  
Dimitry Zarkh

### **COVID-19 Response Team**

The COVID-19 Response Team, formed at the start of the pandemic in March 2020, continued its work through the 2021-22 church year. Since its inception the Team has focused on three key tasks:

- Monitoring information on the state of the pandemic, such as infection and hospitalization rates,
- Staying informed about risk reduction practices for in-person gatherings, and
- Recommending policies and guidelines to the Board of Managers that balance the safety of our most vulnerable members with our community's need for connection and fellowship.

This year, as the availability of vaccines and the spread of new variants gave each church gathering a unique mix of risks and opportunities, the Team also provided advice to church groups, renters, and individuals planning events. During the course of the year the Team consulted on nearly twenty such one-time or recurring events.

From late summer until the end of 2021, while the COVID picture was changing rapidly, the Team met nearly every week. Through the entire church year, the Team held thirty meetings.

Thirteen members served on the Team for various intervals during the year: Jess Acosta, Daphne Blount, Michael Carmody, Dan DeHainaut, Rev. Marc Fredette, Sue Genser, Rev. Frieda Gillespie, Carla Hillyard, Chris Johnson, Rev. Becky Sheble-Hall, Devin Shmueli, Barry Stearns, and Muffy Young. The current members (in May of 2022) are Michael, Dan, Carla, Rev. Becky, and Barry.

The church year began with the Board of Managers calling a sister committee, known as the Reopening Team, to focus on the operational aspects of worship and fellowship amid COVID-imposed restrictions. While that team's report is found elsewhere, the Response Team wishes here and now to acknowledge their thoughtful and creative work in turning our restrictive lemons into the lemonade of hybrid fellowship.

---

Among the other milestones of the year:

- **September 2021:** The Team updated its guidelines for church members' and renters' gatherings.
- The Team recommended criteria and restrictions for a phased return to in-person worship, beginning with Sanctuary attendance limited to worship leaders and members who cannot attend via Zoom ("limited presence").
- **October 2021:** The Team monitored and provided technical assistance for the Clothing Exchange's fall reopening.
- Based on church members' growing familiarity with safe practices, their need for more personal connection, and the ventilation studies performed by Joel Weddig and Emma Campbell for the Reopening Team, the Response Team recommended easing attendance limits on in-person worship, beginning in mid November.
- **November 2021:** On the Team's recommendation the Property Commission purchased additional portable HEPA air filters for the Harrington Room and the Chapel.
- **December 2021:** Amid rapidly rising infection rates from the new Delta variant of COVID-19, the staff Worship Team limited in-person attendance at the Christmas Eve candlelight service to September's "limited presence" level.
- The Response Team subsequently recommended to the Board that attendance remain limited through the months of January and February.
- **February 2022:** The Team recommended returning in-person worship attendance to October 2021 levels beginning in mid March, based on falling infection rates in Middlesex County.
- **March 2022:** The Team completed new guidance for renters on managing COVID-19.

In May of 2022, as COVID-19 approaches an endemic phase, it is both more difficult and less helpful for church leadership to provide broadly applicable guidelines on safe gatherings. For any particular gathering, both the risks and the most effective mitigation strategies depend on the unique group of participants and the exact mix of activities planned.

Fortunately, we all have much more knowledge of COVID-19 than we did spring of 2021, and better tools to prevent and treat it. In many ways, the work of the Response Team has become the work of all of us. Acknowledging that, the Response Team is now completing a new set of documents to guide church members through the process of planning future activities.

The Response Team is grateful to our church community for their understanding, their cooperation, and their resourcefulness as we've traveled this bumpy road together. And this is worth repeating: Making sure that every one of us, and particularly those most vulnerable to infection and dire outcomes, can gather in safety must now be one of the ways in which we live our covenant—to dwell together in peace...and to help one another.

Respectfully submitted,  
The COVID-19 Response Team

## **Jones Partnership Fund Committee**

The Jones Partnership Fund Committee was allocated \$40,000 to distribute this year - 14 non-profit organizations applied for funding which was down from 2021 when 17 organizations made applications, and 2020 when 23 organizations applied. Consideration for funding was based on guidelines in the application. 13 organizations received funding with grants ranging from \$1,000 to \$5,000. A total of \$36,400 was distributed.

The Jones Partnership Committee currently has five members: Jim Ohm; Marianne Cutter; Joan Bone; Peter Babi; Jane True. Appointments are recommended by the Board, the Jones Committee, and/or the congregation. Additionally, the committee seeks 2 volunteer readers to help with the application review each February. This year Leslie Gildersleeve and Martha Creedon were the volunteers. Marianne Cutter will be leaving the committee in 2022 after 6 years of exceptional service! We all give our great thanks to Marianne for her work on behalf of the Jones Partnership Fund.

As the Jones Partnership Fund continues to provide financial support in the community for many important organizations and community programs, the committee is grateful to our church Board of Managers and church membership for their feedback and trust as we seek to evolve and improve our mission.

Jim Ohm, Chair

## **Nominating Committee**

The First Parish Nominating Committee typically meets November-March to recommend nominees for election into service positions. In April the membership voted to elect delegates for General Assembly: Katie Gullotti, Deb Jose, and Kimberly Strafford. At the end of June, these delegates will represent us and vote on issues that come before the assembly of UU congregations. Ace Gullotti and Pam Penton are alternates. Many thanks to all of you.

Now the membership will vote on whether to elect our slate of nominees for service positions with terms of one or two years. Please see the slate at the end of this report. We are extremely grateful to all who agreed to another term in a current position, as well as all who are bravely trying something new.

An exciting development this year is the re-opening of the board position of Religious Education Commissioner. This position has been intentionally left vacant for 6 years, in part due to a shortage of volunteers. Pam Penton has agreed to step up and shepherd us through this transition, and the RE program could not be in better hands.

Some changes in our own committee are: Jim Griffeth is moving to Rhode Island, taking his fabulous spreadsheet skills that have kept us organized. It will take effort to get us up to speed so we can keep Jim's comprehensive spreadsheet alive, but we will do it! Jacob Allen is stepping off the committee, and so is Martha Gallagher, who has agreed to be Membership Commissioner. A huge thank you to all three of you. Bee Fortin, Ace Gullotti, and Joyce Wilbourn will carry on, and we are delighted to welcome three new members: Nancy Lawrence, Andy LeCompte, and Dimitry Zarkh.

We look forward to having productive conversations with many of you about how you might fill service positions that will open up a year from now. Please know that whether you say no or yes, we deeply appreciate you and your place in our community.

If there is a service position you are interested in, please don't hesitate to contact any of us. We scan the membership roster and the faces we see on Zoom and in church, but it is possible for us to overlook someone who has skills to contribute. It takes all hands on deck to keep our FPW ship on course.



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

## **Pastoral Care Team and Care Crew**

Every Sunday, First Parish in Waltham members join together and recite a covenant whose words includes performing service and helping one another. In practice, these words often take the form of connecting with each other informally as well as by participating on the Pastoral Care Team or Care Crew.

The Pastoral Care Team and Care Crew are separate entities; although in the past two years both have been overseen by a lay leader. Care Crew is a hands-on group of approximately 10 volunteer members who perform concrete tasks including sending letters, cooking and delivering meals, or providing rides.

The Pastoral Team consists of the FPW minister and lay leaders who provide emotional support during times of emotional distress by making hospital visits, comforting the bereaved, or connecting via phone calls, letters and in person visits. Pastoral Team support may extend beyond the initial visit depending on the individual need. Confidentiality as well as respect for each individual's healing journey are key components. The Pastoral Team, with the permission of the member or member's family, also sends out pastoral updates to the entire congregation. For the year, 2021-2022, the Pastoral Team members were Rev. Marc, Rev. Frieda, Rev. Becky and Daphne Blount. Joyce Wilbourn also contributed. Requests for care were funneled through Daphne Blount.

This past year, FPW relied more heavily on the lay leadership and members to provide pastoral care due to the retirement of Rev. Marc, the short tenure of Rev. Freida and the transition of Rev. Becky from part time to full time ministry. However, it is important to note that staff members Emma, Devin and Rev. Becky were very mindful of the changes occurring and kept the Pastoral Team informed about concerns they had about members that might have otherwise gone un-noticed. The requests for Care Crew were down from the previous year as members often contacted people in their FPW friendship network for assistance.

Although not typically a Pastoral Team role, the Pastoral Team collaborated with the Finance Committee and sponsored a Covid safe outdoor chili lunch intended to address the isolation many experienced due to Covid and resulting lack of in-person services. The lunch was well attended. One example of extraordinary service was demonstrated by Plum Kennard who continued to write to a youth for approximately 1.5 years long after the official letter writing campaign stopped.

There has been an intention for several years to increase the number of people on the Pastoral Team. The needs of the congregation are too great for one or two people to serve the community especially if there is a crisis among more than one member simultaneously. Between Covid, retirement of Rev. Marc, and the resignation of Rev. Frieda, many members expressed the need to communicate their concerns in both a public and private way. Two ideas for improvement would be to have a volunteer record the joys and concerns expressed each week and forward to the Pastoral Care Team. Additionally, establishing a pastoral team email where members can send their updates and concerns to would centralize the information and be the first step in creating tracking system. Currently, there is no formal tracking system and it was found that having that data would have provided some historical information as well as

on when members passed away. Information is now stored in the collective memories of the team and not in a unified way. That being said, a clear understanding of what the members expect and whether their needs are being met by the Pastoral Team should be developed.

During the announcement period of each Sunday service, members are reminded that they can contact the minister or lay leader if they have a concern they would like to discuss privately. Ideally the team would represent the diversity of the congregation. The question of how to get more members on the team remains. Rev. Marc wrote up a job description for Pastoral Team volunteers and both Rev. Marc and Rev. Becky suggested offering trainings to lay people. Developing a more robust team will hopefully be part of the interim minister's responsibility. In addition to having a Pastoral Team, one thought is to create a pastoral community. This would involve the creation of smaller groups within the FPW membership to develop closer connections and allow members to minister to each other. This would serve to enlarge a member's support network and supplement the work of the Pastoral Team.

In addition to enlarging the Pastoral Team, the Care Crew database needs to be updated. It would be important to remind the congregation periodically that Care Crew exists and volunteers are always welcome. Ideally, while all requests for aid could come through the Pastoral Team, Care Crew responsibilities could be delegated to someone not on the Pastoral Team or have that be the only responsibility the Pastoral Team member has.

Given that ministering to each other contributes to the sense of belonging and being cared for, especially in time of great need, it is important to recognize that the Pastoral Team is aware of the emotional wellbeing of individuals and the membership at large. Having a presence on the Board of Managers would add an important perspective that is not now formally represented in the decision making process.

Lastly, if we all agree that pastoral care is an important part of the FPW community, its existence should be noted somewhere on the website.

Respectfully submitted,  
Daphne Blount

## **Personnel Committee**

It has been a challenging year for the Personnel Committee, with major changes in leadership and other staff at First Parish that required us, at times, to stretch beyond our committee charge.

Our committee charge:

1. **Staff performance appraisals:** In a normal church year, we monitor the performance review schedule, checking in with the Minister to ensure that reviews were taking place. It was unclear to us whether these reviews were taking place and/or were scheduled. This does not mean they were not, but we were sidelined by related issues with our Interim Minister's supervisory responsibilities with the staff.
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.
3. **Maintain and revise as needed job descriptions** for all non-ministerial staff.
  - a. In early December 2021, Chris Johnson gave notice that he would retire at the end of the year. We reviewed the Office Manager job description and made some minor changes, mostly to reflect procedures that came about due to pandemic programming.

- b. The 10-hour Community Minister position that Rev. Becky Sheble-Hall previously held was put on hold when Becky stepped forward as Acting Minister following the unanticipated departure of Rev. Frieda Gillespie.
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. Other priorities took our time and attention, but the guidelines continue to be a useful reference. All non-ministerial staff receive and acknowledge having received the Employee Handbook on an annual basis when we provide their salary letters to the Board President for review and distribution.
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.

In December, we created a search committee to hire a new Office Manager following Chris Johnson's announcement that he was retiring. We hired someone who we expected would be with us for two years, but in mid-April that person resigned. A new recruiting process is still underway as of this writing in early May.

To Acting Minister Rev. Becky Sheble-Hall, Director of Community Engagement Devin Shmueli, Music and Choir Director Emma Campbell, and Groundskeeper Richard Farina: we remain grateful for your continued creativity and dedication not only during the devastating pandemic, but during this very difficult time of transition in ministerial and staff positions. We thank our fellow members and friends who have been understanding and patient with staff as we navigate this time.

We encourage anyone who is interested in serving on the Personnel Committee to please contact us. Our charge calls for five members, so we have room and would love to explore your interest with you.

Respectfully submitted,  
Martha Creedon, Chair  
Donna VanderClock

## **Worship Committee**

This past church year, the Worship Committee continued its Ministry with member-led services sharing traditional and non-traditional views on many faith traditions, UU principles, social and political issues affecting our society. We strive often to explore topics not typical for clergy-led services, and push the envelope of convention to raise difficult, important questions and spur dialogue.

Our service on October 31 had as its theme a quote by Isaac Asimov *Life is pleasant. Death is peaceful. It's the transition that's troublesome.* We touched on the traditions of Day of the Dead, Kaddish, as well as poetry and song that honor humans' passing into spirit.

The traditional Solstice Service was held in the Sanctuary, honoring the mid-winter celebration with rituals, chants, drumming, and the traditional altar facing north, south, east and west. Providing a remote service from the Sanctuary with Covid protocols was a challenge, but we adapted as best we could.

Our March service, titled, *The Hard Work of Hope*, was heavy with poetry, music, and readings of how other faith traditions view hope; not as simple optimism, but something we often must work to achieve. The Service was punctuated with a poem, *My Orion* by Karen Klein, and a song I wrote and sang, *Sometimes Hope Is All I Have* (not entirely biographical).

Our service in March explored aspects of the fifth UU principle: *The Right of Conscience and the Use of the Democratic Process Within Our Congregations and in Society at Large.* As with many of the

principles this one is hard to live by, especially in cases where balance must be found with individual rights and the will of the majority.

May 1 marked the second day of Beltane/May Day, celebrated throughout the world to honor the season of fertility and new life. We also talked about other earth-based traditions including a Native American story honoring the salmon migration.

Our last member-led service this year is the Poetry Service, still being planned at this writing. Marty, Daphne, and Karen are gathering poetry, prose, meditation, and harp music for this annual tradition.

In my second year as chair, I think I'm the hang of it. Our committee's core members have many differing opinions which are reflected in the varied views expressed in elements of our Service. They all work hard, not only to gather and write our parts, but to brainstorm ideas and somehow pull these idea balloons down to the table and piece together a Service that flows just right. We're all just amateurs, learning as we go.

We did all this shifting from hybrid to all-remote and back to hybrid, coordinating with our omnipresent audio-visual-Zoom tech. support team. They make that seamless connection each week to our Beloved Community separated by distance and joined in spirit.

I'm grateful to Rev. Becky for her kind guidance in helping me to learn the finer points of worship. I am especially grateful for our team's patience and kindness in helping me to guide the process of crafting services. It seems almost a magical thing sometimes, how a service somehow comes together.

It was wonderful to have a Time for All Ages be a regular part of our services, thanks to Devin Shmueli. Pam Penton stepped up to help whenever we asked and was a key collaborator in our Solstice celebration, along with Jacob Allen. Many members contributed with readings and other elements. In the end, these services would not be possible without the hard work of our core worship team: Marty Ahrens, Daphne Blount, Sue Genser, Karen Klein and Gary Madison. They are the "rod and staff" that lead us with faith and love.

I can think of no greater honor than to serve my beloved First Parish community. For our committee to use their gifts in a process that nurtures both intellect and spirit is a blessing indeed. At times, I thought I might not be able to continue as chair, but to be honest, when it comes together, but it gets me jazzed, so let's go again!

With love and joy,  
Michael Carmody  
Worship Committee Chair

## **AUXILIARY ORGANIZATIONS**

---

### **Clothing Exchange**

**FUNDRAISING**, Messed Up by Covid-19, But customers have come back!

We did open traditional Fall and Spring Seasons, with Covid requirements and precautions. The Fall Season went pretty well, and then the Spring Season was unbelievable! New sales records were set several times.

Besides consignment numbers getting back to past averages, we processed a huge amount of donations. When we opened for the Fall and Spring Seasons, our clothing racks already had good selections from donations.

Besides the larger amount of donations, we had a star volunteer, Claudia Canepari (not a church member), who had the energy and the time to revamp our setup, and had the ability to get words and pictures out on social media such as Facebook. Search for thrift shops near Waltham, and you will find us. We had many new customers, many of which became regulars.

In 2020-21 the WCE paid its pledge of \$4500 to the First Parish budget for the year ending May 31, 2021. However, with the greatly reduced sales a year ago and not sure how the next Fall and Spring Seasons would go, we had reduced our pledge to First Parish to \$2500 for the budget year 2021-22.

As already stated, the Waltham Clothing Exchange has had a great year, and raised our Pledge from \$2500 to \$4500 for the 2021-22 budget. For the First Parish budget for 2022-23, the WCE is pledging \$5500.

Our 65th year should open September 13, with a return to our normal operating hours of 10-4:30 on Tuesdays and special Saturday openings (advertised as yard/garage sales) in the Fall and Spring.

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! To reduce confusion, you can refer to us as the Waltham Clothing Exchange Thrift Shop. Refer people to the First Parish website for our brochure and more information. Messages can be left at 781-330-0389 or sent to [WalthamClothingExchange@gmail.com](mailto:WalthamClothingExchange@gmail.com)

### **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, that program has been discontinued. We currently are providing leftover housewares to Newton and Waltham programs. We respond to requests for winter gear from several local organizations. The WCE gets paid a modest amount for the clothing leftovers from a textile recycling company. The rest go to Goodwill and More Than Words.

### **OUR VOLUNTEERS**

It has been a difficult two years for our volunteers, caught between their own health concerns and a desire to resume an activity they all seem to enjoy doing. None of our volunteers suffered serious Covid-19 symptoms during our seasons, and there were no reports concerning any of our customers.

Church members who help out weekly include Joan and Alan Bone, Nancy Lawrence, Amy Eastwood, Leslie Gildersleeve, Roberta Trudeau, Grace Shea, 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, and Claudia Canepari.

If interested in volunteering, if just for a Saturday opening or on a trial basis, contact us.

## **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 65th season on Tuesday, September 13 at 10 am. Thank you for your generous donations. They really help our bottom line. We invite you all to participate as customers, consignors, donators, 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 and has been 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 2021, 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.

**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. 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 2021, as was true globally, the COVID-19 pandemic continued to have a profound nationwide effect. Mass vaccination in Kenya began in March 2021, following the prioritized vaccination of healthcare workers and teachers the month before. Also in March 2021, Kenya's president mandated a nationwide curfew; in Mumias, the curfew was from 10PM to 4AM. To respond to the pandemic this past year, Acacia in Kenya's primary fundraising goals continued to focus on COVID-19 prevention and vaccination education as well as menstruation hygiene and reproductive rights.

**2021–2022 Accomplishments.** The COVID-19 pandemic continued to curtail or cancel 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, including transmission prevention and vaccination education; Care Packages for students and their families, including food and toiletries; and coordination with local leaders and community health workers
- \* Continued support for sponsored students studying at home to keep them on track and support readiness for the eventual return to school
- \* Continued education programs focusing on sexual and reproductive health rights education
- \* 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; health and hygiene programs; and planned construction of a medical clinic
- \* AIK-Sponsored students attending the St. Elizabeth Lureko Girls Secondary School, the SELGS Vocational College, and postsecondary institutions
- \* Ongoing Menstrual Hygiene Management education— Marked *Menstrual Hygiene Day, 28 May 2021* at Matawa Polytechnic, Mumias
- \* Participation in 2021 International Women’s Convocation Annual Meeting, 15 June 2021— Noel Lutomia, AIK Project Coordinator, made a presentation on Sexual and Reproductive Health and Rights
- \* Participation in *International Day of the Girl Child, October 2021*—
- \* Dedicated fundraising for specific vocational college supplies and tools, personal supplies, and toiletries
- \* **Special Project: Major Supply Delivery.** Partnering with [Partners for World Health](#), Acacia in Kenya purchased a shipping container to be fully stocked with 2 types of supplies and shipped to Mumias. Half the supplies were medical supplies for a clinic/hospital. The other half of the supplies were supplies for Acacia in Kenya’s local partners in Mumias and musical instruments and equipment for our sister organization [Global Youth Groove](#).

**Current Major Priorities and 2022–2023 Objectives.** Annual objectives always include consistent promotion of AIK’s mission and goals to retain current donors and acquire new donors and contributors. In the second half of 2021 and the first half of 2022, AIK’s primary objective has been to assist Mumias students and their families through living with COVID-19’s tremendous impact on everyday life and to support vaccination education. Going forward, as the pandemic’s impact allows, priorities for the next 12 months include:

- \* Initiation of new Capital Campaign for the construction of a medical clinic/hospital in Mumias
- \* New sponsorships for secondary school and university students (number of students TBD), provided sponsors can be found who will supply full funding up front. Sponsorship amounts may include most, if not all, of tuition fees, room and board fees, transportation expenses, and school supplies and general living expenses. Additional expenses may be covered as donor funding allows.
- \* Ongoing fundraising for everyday necessities, toiletries, appropriate clothing, high school supplies, and other supplies such as materials and agriculture tools for the Vocational College
- \* Participation in activities to mark *International Women’s Day, 8 March*
- \* Ongoing Menstrual Hygiene Management education, including activities to mark *Menstrual Hygiene*

*Day, 28 May 2022*

\* Participation in 2022 International Women's Convocation Annual Meeting, 14 June 2022

Once again, Acacia in Kenya commends with gratitude Projector Coordinator Noel Lutomia for her swift, consistent, and reliable response to the ongoing 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, and in 2021, added vaccination education to those resources.

A \$2500 grant from Acacia in Kenya allows the Mumias team and St. Elizabeth Lureko Girls Secondary School to:

1. Provide 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

These efforts demonstrate the enormous power of a very modest sum of funding from Acacia in Kenya. We may be a small organization, but we make a big difference thanks to the dedicated, effective leadership of our local partners in Kenya and a reliable donor base here in the U.S.



# **FINANCIAL and REFERENCE DOCUMENTS**

---

## **Financial Reports**

### **Treasurer's Report**

Budget History and Draft Proposal  
Notes About the Proposed Budget  
Proposed Budget  
Income & Expense Statement, Actual vs Budget

### **Assistant Treasurer's Report**

Budgeted Income Received  
Non-Budgeted Income, Donations, Special Projects Revenue

### **Trustees of the Permanent Funds Report**

Report

Charts and Graphs:

- Five Year Comparative Report of Assets and Operating Results
- Summary of Asset Allocation
- Summary Statement of Return on Investments and Disbursements
- Investment Results
- Investment Portfolio
- Analysis of Named Funds
- Permanent Funds Compared to Consumer Price Index

## **Jones Partnership Fund**

Grant Recipients for 2022

## **Nominating Committee**

2022-2023 Nominees

# Treasurer's Report

## First Parish in Waltham, Budget History and Proposed Budget 2022-23

Donna VanderClock, Finance Commissioner &  
Janet Riley, Treasurer

2019-20	2020-21	2021-22	2021-22	2022-23	
Actual	Actual	Adopted Budget	Actual	Proposed Budget	% Change

### Regular Income

<b>Pledges</b>	121,160	114,339	120,000	121,899	124,000	3.3%
<b>Rentals</b>	48,684	20,945	50,000	44,161	50,000	0.0%
<b>Gifts/Offerings</b>	9,716	6,608	10,000	4,972	8,000	-20.0%
<b>Ways &amp; Means</b>	7,437	8,615	8,000	8,302	9,000	12.5%
<b>Sale of FPW History Books</b>	-	-	1,650	0	2,250	36.4%
<b>Clothing Exchange</b>	4,500	4,500	2,500	4,500	5,500	120.0%
<b>Subtotal Regular Income</b>	<b>191,496</b>	<b>155,007</b>	<b>192,150</b>	<b>183,835</b>	<b>198,750</b>	<b>3.4%</b>

### Other Income

<b>From General Endowment</b>	111,000	110,000	109,000	109,000	108,000	-0.9%
<b>From Endowment Restricted Purpose Funds</b>	5,580	4,000	4,000	4,000	4,000	0.0%
<b>Subtotal Income From Endowment</b>	<b>116,580</b>	<b>114,000</b>	<b>113,000</b>	<b>113,000</b>	<b>112,000</b>	<b>-0.9%</b>
<b>Net Other Income minus Expenses</b>						
<b>Other Income</b>	725	-	-	296	-	
<b>Retreat</b>	-	-	-	4,907	-	
<b>Other Grants and Special Fundraising</b>	1,000	1,000	900	900	900	0.0%
<b>Subtotal Other Non-Endowment Income</b>	<b>1,725</b>	<b>1,000</b>	<b>900</b>	<b>6,103</b>	<b>900</b>	<b>0.0%</b>

### Total Income

<b>309,801</b>	<b>270,007</b>	<b>306,050</b>	<b>302,938</b>	<b>311,650</b>	<b>1.8%</b>
----------------	----------------	----------------	----------------	----------------	-------------

<b>Personnel Expenses</b>	<b>213,678</b>	<b>199,562</b>	<b>210,987</b>	<b>190,515</b>	<b>211,655</b>	<b>0.3%</b>
<b>Salary &amp; Wages</b>	135,929	138,928	140,078	130,846	127,940	-8.7%
<b>Housing - Minister</b>	24,000	24,000	24,000	27,000	24,000	0.0%
<b>In Lieu of Employer FICA</b>	5,665	5,948	5,773	4,962	3,587	-37.9%
<b>Health Insurance Expense</b>	15,322	1,757	6,424	5,905	21,990	242.3%
<b>Dental Insurance Expense</b>	696	687	120	120	480	300.0%
<b>Long Term Disability &amp; Life Insurance</b>	-	-	1,600	0	1,600	0.0%
<b>Pension Contributions</b>	10,964	12,593	12,889	11,645	14,032	8.9%
<b>Community Minister &amp; Sabbatical Coverage</b>	6,000	4,000	-	-	-	
<b>Social Security &amp; Medicare</b>	6,569	6,275	6,778	6,065	8,036	18.6%
<b>Employer MA State Tax</b>	31	1	-	1	-	
<b>Professional Expenses</b>	6,793	3,535	11,450	2,221	8,115	-29.1%
<b>Workers' Compensation Insurance</b>	1,707	1,839	1,875	1,750	1,875	0.0%

Donna VanderClock, Finance Commissioner &  
Janet Riley, Treasurer

2019-20	2020-21	2021-22	2021-22	2022-23	
Actual	Actual	Adopted Budget	Actual	Proposed Budget	% Change

**Property Expenses**

Electricity	7,213	6,537	7,400	8,351	8,500	14.9%
Fuel oil	4,115	594	1,800	-	3,500	94.4%
Gas	3,904	3,725	4,700	5,273	5,000	6.4%
Grounds Upkeep	620	2,392	2,200	375	1,500	-31.8%
Cleaning Service	6,720	-	8,200	4,320	8,200	0.0%
Snow Removal	3,200	3,900	4,000	4,000	4,500	12.5%
Property Insurance	10,144	8,194	8,765	9,603	9,600	9.5%
Repairs & Maint.	9,632	7,810	6,800	3,320	6,000	-11.8%
Supplies	2,425	528	2,300	1,249	2,000	-13.0%
Trash removal	1,617	(25)	2,000	889	2,000	0.0%
Water & Sewer	1,754	1,113	1,900	2,306	1,900	0.0%
Capital Expenditures - Total	1,971	26,119	3,500	7,235	13,800	294.3%
<b>Subtotal Property Expenses</b>	<b>53,315</b>	<b>60,887</b>	<b>53,565</b>	<b>46,921</b>	<b>66,500</b>	<b>24.1%</b>

**General Overhead Expenses**

Office Expense	5,426	5,247	5,171	4,934	5,456	5.5%
Telephone	3,679	3,080	3,187	3,618	3,240	1.7%
UUA Contribution	4,695	4,718	4,760	4,760	4,922	3.4%
UUA General Assembly Expenses	450	600	2,400	825	2,400	0.0%
Retreat Subsidy - Net	3,959	-	-	-	1,200	
<b>Subtotal General Overhead Expenses</b>	<b>18,209</b>	<b>13,644</b>	<b>15,518</b>	<b>14,138</b>	<b>17,218</b>	<b>11.0%</b>

**Commission Expenses**

Board Expenses and Board-Level Committees	327	225	500	330	500	0.0%
Community Outreach - Total	17	500	1,180	19	690	-41.5%
Finance & Stewardship - Total	8,107	8,024	10,200	9,481	10,200	0.0%
Membership Integration	705	-	725	266	725	0.0%
Marketing & Promotion	658	2,226	3,331	2,211	2,487	-25.3%
Music and Worship - Total	5,903	3,600	6,000	6,171	10,620	77.0%
Religious Education - Total	3,246	4,605	5,600	2,681	4,140	-26.1%
<b>Subtotal Commission Expenses</b>	<b>18,963</b>	<b>19,180</b>	<b>27,536</b>	<b>21,160</b>	<b>29,362</b>	<b>6.6%</b>

**Other Expenses**

Print FPW History Book (100 copies)	-	-	1,650	1,181	1,181	-28.4%
Miscellaneous	111	-	-	-	-	
<b>Subtotal Other Expenses</b>	<b>111</b>	<b>-</b>	<b>1,650</b>	<b>1,181</b>	<b>1,181</b>	<b>-28.4%</b>

<b>Subtotal Non-Personnel Expenses</b>	<b>90,598</b>	<b>93,711</b>	<b>98,269</b>	<b>83,399</b>	<b>114,261</b>	<b>16.3%</b>
--	---------------	---------------	---------------	---------------	----------------	--------------

<b>Total Expenses</b>	<b>304,276</b>	<b>293,273</b>	<b>309,256</b>	<b>273,915</b>	<b>325,916</b>	<b>5.4%</b>
-----------------------	----------------	----------------	----------------	----------------	----------------	-------------

Income minus Expense	\$5,525	(\$23,266)	(\$3,206)	29,023	(\$14,266)	-86.2%
PPP Grant - 2020	-	37,982	-	-	-	

Net Carry Forward	\$5,525	\$14,716	(\$3,206)	\$29,023	(\$14,266)	
Cumulative Surplus from prior year	\$24,989	\$30,515	\$45,231	\$45,231	74,254	

## **Notes about the Proposed Budget 2022-2023**

Donna VanderClock, Finance Commissioner

### **Overall Increase**

The total amount of proposed budgeted expenses for FY 2023 is increasing by 5.4% from \$309,256 in FY 2022 to \$325,916.

### **Income**

Budgeted pledges are \$124,000. Thanks to all who pledged, and especially those were able to increase their pledges this year.

Budgeted rental income is \$50,000; in FY 2021, this category of income fell significantly short because of minimal use of the building due to Covid-19. FY 2022 rental income has been restored to about \$44,000 or 88% of budget, and we expect that trend to continue.

The budgeted amount for Ways & Means income (auctions and other fundraising) is increasing by \$1,000 to \$9,000.

The contribution by the Clothing Exchange is increased to \$5,500 because they have had a very successful sales year.

### **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 2023, we are again reducing the draw from the endowment funds (both restricted and unrestricted funds) from \$113,000 to \$112,000, a reduction of \$1,000 or 0.9%. This amount represents approximately 4.9% of the value of the endowment. As always, 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**

As of the beginning of June, we are in a different place with regard to personnel and staffing than we had planned to be when we started the budget process. Here are the highlights:

Because we were not successful in getting an Interim Minister, the Board has asked the UUA to assist in finding a part-time minister to help us by supervising staff, working with boards and committees, and leading interim ministerial work. The personnel budget includes an assumption about salary and part-time benefits for such a person, although the full amount assumed to be needed for health insurance for a full-time minister is included.

Rev. Becky has offered to work a 20 hour per week schedule for the next church year, with her role to include worship services, pastoral care, and development of programs. Her salary and part-time benefits are included.

The Director of Community Engagement is budgeted at 20 hours per week, and funds are included for health insurance and pension contributions.

As a one-year trial, Emma Campbell has agreed to serve in the roles of both Music & Choir Director and Office Manager for 35 hours a week. The Music & Choir portion is increased to 15 hours a week from 10, and the Office Manager portion remains at 20 hours a week. In this combined position, she becomes eligible for a pension contribution, which is included.

The groundskeeper continues in his 10 hour a week position, which includes minor building maintenance and repair when time permits.

Compensation plans incorporate the recommendations of the Personnel Committee, which strives to stay within UUA fair compensation guidelines while also being mindful of inflation. A modest cost of living increase of 2% is included.

### **Property Expenses**

The primary increase in this budget is for repair of the roof, which will cost \$6,900. In addition, \$2,800 or half the cost of repairing the steps, started in FY 2022, has been added, as well as additional funds for electricity, fuel oil, and natural gas, reflecting actual expenses in FY 2022.

### **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 (which would be \$19k for FY 2023). 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 2023 increase by the amount we anticipate regular income to increase, or 3.4%.

### **General Overhead Expenses**

This budget includes the cost of various office-related items including Zoom subscriptions. Funding is provided for delegate attendance at the annual UUA General Assembly (GA) in order to better offset the cost of attendance. A retreat subsidy is included for the 2022 Ferry Beach retreat.

### **Community Outreach**

The cost of a Waltham Connect event is included as well as support for a Christmas Eve community dinner, a Juneteenth community celebration and other events.

### **Finance & Stewardship**

This budget consists primarily of the fees paid to our accounting firm and is level funded.

### **Membership Integration**

This budget includes funding primarily for hospitality supplies and is level funded

### **Marketing & Promotion**

In order to promote First Parish as a wedding venue, we pay to be listed on “WeddingWire.” An additional \$500 is included for other marketing related purposes.

### **Music & Worship**

The increases in this budget include funds for guest speakers/worship leaders once per month, additional funding for instrument maintenance, and professional development related costs for the Music & Choir Director, who is participating in a UU Music Certification Program.

### **Religious Education**

This budget includes funding for teaching staff, curriculum materials, lifespan classes, and support for a Jr & Sr Youth Group. The amount allocated to the Buddhist Meditation Group has been reduced, since they are primarily meeting online.

### **Other Expenses**

There are funds included to print an updated First Parish history book in honor of our 325<sup>th</sup> year. Half of the funds needed has been spent in FY 2022, and the remaining amount will be due in FY 2023. The amount is expected to be at least partially offset by income from sale of the books.

### **Income minus Expense**

Conservative budgeting and staff turnover this year have resulted in surplus funds in our bank account. We started the fiscal year with a \$45,000 surplus and expected that we would use at least \$3,000 of that to support the FY 2022 operating budget. In fact, we expect to end the fiscal year with at least a \$20,000 surplus, which will be added to the \$45,000 balance. Keeping a surplus is desirable, because it protects us

from shortfalls in rental income and other income sources, such as what happened during the period when the building was closed due to Covid. In addition, an accumulated surplus could be used to help fund future one-time capital needs, particularly related to the building.

For FY 2023, we plan to use \$14,266 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 2023, we would end the year with at least  $\$74,254 - \$14,266 = \$59,988$  in excess cash available for future use. Most years, we end with a surplus, with the recent exception of FY 2021 when the building was closed, resulting in significant loss of rental income.

### **Coronavirus Pandemic Considerations**

This budget assumes relatively normal operations during FY 2023. 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.

###

## Proposed Budget 2022-2023

<b>First Parish in Waltham - Proposed Budget 2022-2023</b>	
Donna VanderClock, Finance Commissioner	
<b><u>Income</u></b>	
<b>Regular Income</b>	
Pledges	124,000
Rentals	50,000
Gifts/Offerings	8,000
Ways & Means	9,000
Sale of FPW History Books	2,250
Clothing Exchange	5,500
<b>Subtotal Regular Income</b>	<b>198,750</b>
<b>Other Income</b>	
From General Endowment	108,000
From Endowment Restricted Purpose Funds	4,000
<b>Subtotal Income From Endowment</b>	<b>112,000</b>
<b>Net Other Income minus Expenses</b>	
Other Grants and Special Fundraising	900
<b>Subtotal Other Non-Endowment Income</b>	<b>900</b>
<b>Total Income</b>	<b>\$ 311,650</b>
<b><u>Expenses</u></b>	
<b>Personnel Expenses</b>	
Minister Salary & Housing (2 part-time positions)	71,150
Director of Community Engagement Salary	26,838
Music & Choir Director Salary (combined with Office Manager)	18,571
Office Manager Compensation (combined with Music & Choir)	23,760
Grounds Keeper Compensation	11,621
In Lieu of Employer FICA	3,587
Social Security & Medicare	8,036
Medical & Dental Insurance	22,470
Long Term Disability & Life Insurance	1,600
Pension Contributions	14,032
Professional Expenses	8,115
Workers' Compensation Insurance	1,875
<b>Total Personnel Expenses</b>	<b>211,655</b>
<b>Property Expenses</b>	
Electricity	8,500
Fuel oil	3,500
Gas	5,000
Grounds Upkeep	1,500
Cleaning Service	8,200
Snow Removal	4,500
Property Insurance	9,600
Repairs & Maint.	6,000
Supplies	2,000
Trash removal	2,000
Water & Sewer	1,900
Capital Expenditures - Total	13,800
<b>Total Property Expenses</b>	<b>66,500</b>

<b>General Overhead Expenses</b>	
Office Expense	5,456
Telephone	3,240
UUA Contribution	4,922
UUA General Assembly Expenses	2,400
Retreat Subsidy - Net	1,200
<b>Subtotal General Overhead Expenses</b>	<b>17,218</b>
<b>Commission Expenses</b>	
Board and Committee Expenses	500
Community Outreach/Social Action	690
<b>Finance &amp; Stewardship</b>	
Accounting	9,000
Stewardship Dinner	700
Bank Fees	500
<b>Finance &amp; Stewardship Total</b>	<b>10,200</b>
<b>Marketing &amp; Promotion</b>	<b>2,487</b>
<b>Membership Integration</b>	<b>725</b>
<b>Music and Worship</b>	
Musicians	1,550
Guest Speaker	3,850
Music/Worship Supplies	800
Flowers	450
Instrument Maintenance	1,335
Professional Development	1,835
Music/Worship Other	800
<b>Music and Worship - Total</b>	<b>10,620</b>
<b>Religious Education</b>	
Teaching Staff	2,700
Curriculum Materials	500
Jr/Sr Youth Group	90
Lifespan Programs/Events	500
Buddhist Meditation Group	300
Religious Education - Other	50
<b>Religious Education - Total</b>	<b>4,140</b>
<b>Subtotal Commission Expenses</b>	<b>29,362</b>
<b>Other Expenses - Print FPW History Book</b>	<b>1,181</b>
<b>Subtotal Non-Personnel Expenses</b>	<b>114,261</b>
<b>Total Expenses</b>	<b>\$ 325,916</b>
<b>Income minus Expense</b>	<b>(\$14,266)</b>
<b>Surplus from prior year</b>	<b>\$14,266</b>



## Income and Expense Statement, Actual vs Budget

Income		Budget	Actual	Remaining	% of Budget
<b>Regular Income</b>					
		120,00	121,89		
	Pledges	0	9	(1,899)	102%
	Rentals	50,000	44,161	5,839	88%
	Gifts/Offerings	10,000	4,972	5,028	50%
	Ways & Means	8,000	8,302	(302)	104%
	Sale of FPW History Books	1,650	0	1,650	0%
	Clothing Exchange	2,500	4,500	(2,000)	180%
	<b>Subtotal Regular Income</b>	<b>192,150</b>	<b>183,835</b>	<b>8,315</b>	96%
<b>Other Income</b>					
		109,00	109,00		
	From General Endowment	0	0	0	100%
	From Endowment Restricted Purpose Funds	4,000	4,000	0	100%
	<b>Subtotal Income From Endowment</b>	<b>113,000</b>	<b>113,000</b>	<b>0</b>	100%
	Other Income	-	296	0	100%
	Retreat	-	4,907	0	100%
	Other Grants and Special Fundraising	900	900	0	100%
	<b>Subtotal Other Non-Endowment Income</b>	<b>900</b>	<b>6,103</b>	<b>0</b>	678%
	<b>Total Income</b>	<b>306,050</b>	<b>302,938</b>	<b>3,112</b>	99%

Expenses		Budget	Actual	Remaining	% of Budget
<b>Personnel Expenses</b>					
		140,07	130,84		
	Salary & Wages	8	6	9,232	93%
	Housing - Minister	24,000	27,000	(3,000)	113%
	In Lieu of Employer FICA	5,773	4,962	811	86%
	Health Insurance Expense	6,424	5,905	519	92%
	Dental Insurance Expense	120	120	0	100%
	Long Term Disability & Life Insurance	1,600	0	1,600	0%
	Pension Contributions	12,889	11,645	1,244	90%
	Social Security & Medicare	6,778	6,065	713	89%
	Employer MA State Tax	-	1	0	0%
	Professional Expenses	11,450	2,221	9,229	19%
	Workers' Compensation Insurance	1,875	1,750	125	93%
	<b>Total Personnel</b>	<b>210,987</b>	<b>190,515</b>	<b>20,473</b>	<b>90%</b>

### Property Expenses

Electricity	7,400	8,351	(951)	113%
Fuel oil	1,800	0	1,800	0%
Gas	4,700	5,273	(573)	112%
Grounds Upkeep	2,200	375	1,825	17%
Cleaning Service	8,200	4,320	3,880	53%
Snow Removal	4,000	4,000	0	100%
Property Insurance	8,765	9,603	(838)	110%
Repairs & Maint.	6,800	3,320	3,480	49%
Supplies	2,300	1,249	1,051	54%
Trash Removal	2,000	889	1,111	44%
Water & Sewer	1,900	2,306	(406)	121%
Capital Expenditures	3,500	7,235	(3,735)	207%
<b>Total Property</b>	<b>53,565</b>	<b>46,921</b>	<b>6,644</b>	<b>88%</b>

#### General Overhead Expenses

Office Expense	5,171	4,934	237	95%
Telephone	3,187	3,618	(431)	114%
UUA Contribution	4,760	4,760	0	100%
UUA General Assembly Expenses	2,400	825	1,575	34%
<b>Total General Overhead</b>	<b>15,518</b>	<b>14,138</b>	<b>1,380</b>	<b>91%</b>

#### Commission Expenses

<b>Board Expenses and Board-Level Committees</b>	500	330	170	66%
--	-----	-----	-----	-----

<b>Community Outreach</b>	1,180	19	1,161	2%
---------------------------	-------	----	-------	----

#### Finance & Stewardship

Accounting	9,000	9,000	0	100%
Bank Service Charges	500	481	19	96%
Financial Stewardship - other	700	0	700	0%
<b>Total Finance &amp; Stewardship</b>	<b>10,200</b>	<b>9,481</b>	<b>719</b>	<b>93%</b>

#### Membership Integration

Membership Integration - other	725	266	459	37%
Marketing & Promotion	3,331	2,211	1,120	66%
<b>Total Membership</b>	<b>4,056</b>	<b>2,477</b>	<b>1,579</b>	<b>61.08%</b>

#### Music and Worship

Musicians	1,550	675	875	44%
Guest Speakers	760	1,455	(695)	191%
Music/Worship Supplies	800	1,358	(558)	170%
Flowers	500	390	110	78%
Instrument Maintenance	900	1,944	(1,044)	216%
Music & Worship - Other	1,490	350	1,140	23%
<b>Total Music and Worship</b>	<b>6,000</b>	<b>6,171</b>	<b>(171)</b>	<b>103%</b>

#### Religious Education

Buddhist Meditation Group Expenses	650	0	0	0%
Teaching Staff	3,500	1,350	2,150	39%
Curriculum Materials	650	1,039	(389)	160%

Jr/Sr Youth Group	250	36	214	14%
Lifespan Programs/Events	500	256	244	51%
<b>Total Religious Education</b>	<b>5,550</b>	<b>2,681</b>	<b>2,869</b>	48%
<b>Subtotal Commission Expenses</b>	<b>27,486</b>	<b>21,159</b>	<b>6,327</b>	77%
<b>Subtotal Non-Personnel Expenses</b>	96,569	82,218	14,351	85%
<b>Total Expenses</b>	<b>307,556</b>	<b>272,734</b>	<b>34,823</b>	<b>89%</b>
<b>Net Operating Income</b>	<b>(1,506)</b>	<b>30,204</b>	<b>(31,711)</b>	

**Other Income**

Jones Partnership Fund	36,400
Trustees Fund Contributions - Air Purifiers and Sanctuary AV	4,749
Retirement Gift for Chris Johnson	1,135
Minister's Discretionary Fund Donations	838
Special Collections	739
Interest & Dividend Income	10
<b>Total Other Income</b>	<b>43,871</b>

**Other Expenses**

Jones Partnership Fund Awards	36,400
Sanctuary AV project	4,094
Minister's Discretionary Fund Expenses	2,625
Print FPW History Book (100 copies) - 50% deposit	1,181
Retirement Gift for Chris Johnson	1,135
Miscellaneous	755 *
Air Purifiers - Air quality improvements for COVID-19	749
<b>Total Other Expenses</b>	<b>46,940</b>

**Net Other Income (3,069)**

\* Corrects a mis-classified FY21 Trustees transfer

# Assistant Treasurer's Report

First Parish In Waltham Unitarian- Universalist											
Assistant Treasurer's Report for the Annual Meeting Fiscal Year 2021-22											
Part 1: Budgeted Income Received by the Assistant Treasurer											
		2021-22	2021-22	%	2020-21	2020- 21	%	2019-20	2019-20	%	
Income		Budget	YTD	YTD	Budget	YTD	YTD	Budget	YTD	YTD	
<b>Regular Income</b>											
	41120 · Pledges (FY21-22))	120,000	\$121,899.22	102%	118,000	\$114,339.18	97%	117,000	\$118,949.55	102%	
	41123 · Hall Rental	50,000	\$44,161.42	88%	50,000	\$20,945.00	42%	50000	\$48,896.00	98%	
	41124 · Gift/Offerings/WMBG	10,000	\$4,971.79	50%	10,000	\$6,608.29	66%	10000	\$9,715.60	97%	
	41126 · Ways & Means	8,000	\$8,302.22	104%	8,000	\$8,604.88	108%	8000	\$7,437.00	93%	
	41127 · Clothing Exchange	2500	\$4,500.00	180%	4500	\$4,500.00	100%	4500	\$4,500.00	100%	
	<b>Subtotal Regular Income</b>	190,500	<b>\$183,834.65</b>	<b>97%</b>	190,500	<b>\$154,997.35</b>	<b>81%</b>	189,500	<b>\$189,498.15</b>	<b>100%</b>	
<b>Other Budgeted Income</b>											
	41140 · General Endowment	109,000	\$109,000.00	100%	110,000	\$110,000.04	100%	111000	\$111,000.00	100%	
	Restricted Purpose Funds	4000	\$4,000.00	100%	4000	\$4,000.00	100%	5580	\$5,580.00	100%	
	<b>Subtotal Income from Endowment</b>	113,000	<b>\$113,000.00</b>	100%	114,000	<b>\$114,000.04</b>	<b>100%</b>	116580	<b>\$116,580.00</b>	<b>100%</b>	
	Jones Partnership Grants										
	Other Grants and Fundraising	900	\$900.00	100%	1000	\$1,000.00	100%	1000	\$1,000.00	100%	
	<b>Subtotal Other Non-Endowment Income</b>	900	<b>\$900.00</b>	100%	1000	<b>\$1,000.00</b>	<b>100%</b>	1000	<b>\$1,000.00</b>	<b>100%</b>	
	<b>Total Budgeted Income</b>	304,400	<b>\$297,734.65</b>		305,500	<b>\$269,997.39</b>	<b>88%</b>	307,080	<b>\$307,078.15</b>	<b>100%</b>	
<b>Notes:</b>											
	Hall rental includes the Waltham Day Care : \$13,758 for FY22; (\$13,560 for FY21).										
	The Waltham Buddhist Meditation Group contributed \$125 to Gifts and Offerings.										
	Respectfully submitted as of June 2, 2022.										
	Leslie Gildersleeve										
	Assistant Treasurer										

**First Parish In Waltham Universalist-Unitarian**

**Assistant Treasurer's Report for the Fiscal Year (21-22)**

**Part 2: Non-Budgeted Income, Donations, Special Projects Revenues**

<b>NON-BUDGETED RECEIPTS &amp; TRANSACTIONS</b>	
Special Collections	\$5,757.04
Advance Pledges 22-23	\$21,954.34
Memorial Fund	\$295.55
Temporary Funds: includes Jones Partnership Funds from Trustees	\$47,005.16
Ferry Beach Retreat 2022	\$4,907.38
<b>Total Non-budgeted Receipts</b>	<b>\$79,919.47</b>

**Temporary Funds**

\$4,000.00	Jones Partnership for Sanctuary Tech
\$417.64	Voided checks
\$749.97	Trustees for Airpurifiers in Chapel and Harrington Room
\$352.00	Church Mutual Safety Dividend
\$987.07	TIAA Refund to minister retirement contributions
\$109.00	Guide One Refund to worker's compensation
\$36,400.00	Jones Partnership Fund, Trustees
\$3,878.00	Refund from COTW to go to Sponsorship Account
\$111.48	Misc.

**\$47,005.16**

As of June 2, 2022

Respectfully submitted,

Leslie Gildersleeve  
Assistant Treasurer

**Share The Plate and other Special Collections**

\$500.00	Chaplains on the Way
\$984.24	Waltham Farmers Market
\$765.35	Hope for Haiti
\$837.66	Minister's Discretionary Fund
\$1,136.38	Chris Johnson Retirement
\$415.10	Little Queer Library
\$371.00	Campaign Legal Center
\$350.00	Rev Marc Parting Gift
\$397.31	Edinburg Center
<b>\$5,757.04</b>	

**Memorial Fund:**

**Gifts in memory of Evelyn LeBlanc and Lois Peterson**

\$295.55		

## **Trustees of the Permanent Funds Report**

### **Fiscal Year Results**

The Trustees fiscal year from March 1, 2021 to February 28, 2022, had been an interesting year. Starting with assets of about 2.35 million dollars, a peak value of 2.45 million occurred in August, then it dropped 80k in September, then new peaks in September and November around 2.5 million. Dramatic drops in January and February gave us the closing balance of 2.31 million, an asset drop of about 25,000 for the year. In the meantime, the Permanent Funds supported the budget and special projects via transfers of over 152,000 (including JPF funds). For the full fiscal year ended 2/28/2022 the Return on Investment was 3.3%.

### **The Permanent Funds and Prudent Expenditure**

This past year, expenditures from the Permanent Funds 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, until the past 6 months, interest rates have been unusually low, that prudent spending range is often defined as 3% to 5%.

For the fiscal year ended 2/28/2022, expenditures were 4.8% of principal. The Finance Commission has been working towards this goal for years and hopes to keep the Endowment subsidy needs in this range. The consequence of staying in this prudent range 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, and (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 UU22T4).

### **The Permanent Funds and Prudent Investment**

With a long investment horizon, stocks will always beat fixed income or money market investments. 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. This past year, anticipating a turn in the market, we did increase our cash holdings. Then the market went up! But in recent months, the market has gone down significantly. Now our asset holdings are down about 8% since March 1, 2022. But since we have cash on hand for two years at current budget subsidies, we don't have to sell in a downward trending market. That is prudent.

### **Tables Included**

**UU22T1** — Comparative summary of results for five years.

**UU22T2** — Detailed investment results for the latest year.

**UU22T3** — Current investment portfolio by categories.

**UU22T4** — Analysis of the Named Funds.

**Graph** — Permanent Funds compared to Consumer Price Index

Trustees of the Permanent Funds

Joel P Weddig

David S. Wilbourn

Barry W. Stearns

UU22T1 — Five Year Comparative Report of Assets & Operating Results

**SUMMARY OF ASSET ALLOCATIONS**

	2/28/19	%	43524	%	2/29/20	%	2/28/21	%	2/28/22	%
Cash & Short-Term Income	47,037	2	96,571	5	80,171	4	292,068	12	308,088	13
Fixed Assets (Gas Boiler)	30,500	2	24,400	1	18,300	1	12,200	1	6,100	0
CD's, Bonds, Bond Funds	11,673	1	11,827	1	84,103	4	186,990	8	192,652	8
Low Correlation Funds	79,900	4	85,050	5	144,109	7	311,439	13	297,036	13
Equity Securities, Value	309,875	16	283,967	16	385,397	18	255,447	11	301,742	13
Growth & Blended Funds	1,018,196	53	1,060,299	58	951,238	46	997,077	42	989,305	43
International Funds	<u>423,320</u>	22	<u>252,917</u>	14	<u>423,492</u>	20	<u>291,116</u>	12	<u>220,628</u>	10
	1,920,501		1,815,032		2,086,810		2,346,337		2,315,550	
Change in Asset Value			271,778		259,527		-		(30,787)	
Percentage Change			15.0%		12.4%		0.0%		-1.3%	
Annual Inflation Rate			<u>1.5%</u>		<u>1.5%</u>		<u>1.7%</u>		<u>7.0%</u>	
Growth or Loss after Inflation			13.5%		10.9%		-1.7%		-8.3%	

	12 Months 2/28/18	12 Months 2/28/19	12 Months 2/29/20	12 Months 2/28/21	12 Months 2/28/22
Opening Assets	\$1,776,856	1,920,501	1,815,032	2,086,810	2,346,338
Funds Rec'd from Jones FBO Trust	36,750	38,625	39,188	39,188	47,625
Legacy Gifts Received	-	-	318,039	62,817	200
Return on Investments (Income+Gain)					
Cash & Short-Term Income	246	866	1,364	654	26
Depreciation, Fixed Assets	(6,100)	(6,100)	(6,100)	(6,100)	(6,100)
CD's, Bonds, Bond Funds	447	154	(2,725)	6,244	5,662
Low Correlation Funds	21,736	10,513	(10,665)	68,170	(1,097)
Equity Securities, Value Style	1,705	-15,724	9,078	26,171	46,363
Growth Income & Blended	164,206	45,686	83,886	161,597	52,321
International Funds	<u>93,335</u>	<u>-24,390</u>	<u>20,575</u>	<u>60,336</u>	<u>(25,485)</u>
	275,575	11,004	95,412	317,071	71,689
Disbursements					
To Church Operating Budget	119,317	113,349	111,250	110,250	109,000
Other Specific Projects Voted	-	-	-	-	750
Special Purpose Funds	9,365	9,399	9,654	9,299	4,000
Trustee's Expense	-	-	-	-	-
Expenses Subtotal	<u>128,682</u>	<u>122,748</u>	<u>120,904</u>	<u>119,549</u>	<u>113,750</u>
To Jones Partnership	40,000	32,350	36,730	35,000	35,000
Other Jones Non-Budget Exp.	-	-	23,227	5,000	4,000
	(168,682)	(155,098)	(180,861)	(159,549)	(152,750)
Closing Assets	1,920,501	1,815,032	2,086,810	2,346,338	2,313,103
Components of Return on Investment					
Interest & Dividends Received	22,995	24,708	27,684	24,381	32,219
Gain or Loss of Market Value	<u>252,580</u>	<u>(13,704)</u>	<u>82,820</u>	<u>292,692</u>	<u>44,758</u>
	275,575	11,004	110,504	317,073	76,977
As Percentages of Opening Assets					
Total Return on Investments	15.5%	0.6%	6.1%	15.2%	3.3%
Total Expenditures (Excluding Jones Partnership)	7.2%	6.4%	6.7%	5.7%	4.8%

## UU22T2 — Detailed investment results for the latest year.

INVESTMENT RESULTS FOR THE YEAR ENDED 2/28/22						UU22T2			
	VALUE	TRANSACTIONS		VALUE	TOTAL RETURN		----- INCOME -----		CAPITAL
	2/28/2021	Date	Amount	2/28/2022	(Income + Gain)	Withdraw	Reinvest	Gain , (Loss)	
	\$		\$	\$	\$	%			
<b>Cash &amp; Short-Term Income</b>									
Fidelity Money Mkt Accounts	292,068	Various		308,088	767	0.3%	26		741
Accounts Receivable	-		-	-	-	0.0%	-	-	-
Accounts Payable (Minus)	-		-	-	-	0.0%	-	-	-
	292,068		-	308,088	767	0.0%	26	-	741
<b>Fixed Assets (Gas Boiler)</b>	12,200	Depreciate	(6,100)	6,100	(6,100)				(6,100)
<b>CD's, Bonds &amp; Bond Funds</b>									
Loomis Sayles Bond Fund	12,761			12,806	45	0.4%	-	375	(330)
Fidelity Floating Rate Hi Inc.	110,402			113,769	3,367	3.0%		3,620	(252)
Fidelity Capital & Income	63,828			66,077	2,249	3.5%		2,141	108
	186,990		-	192,652	5,662	3.0%	-	6,136	(474)
<b>Growth &amp; Income Blended Funds</b>									
Fidelity Puritan (Alice Smith)	301,234		-	320,655	22,310	7.4%	2,889	-	19,421
UUA Gen. Invest. Fund	10,134		-	9,680	(49)	-0.5%	405		(454)
Vanguard Dividend Growth	86,987			105,351	18,364	21.1%		1,547	16,817
	398,355		-	435,687	40,625	10.2%	3,294	1,547	35,784
<b>Low Correlation Funds</b>									
EatonVance Enhanced Equity 2	201,625			188,549	230	0.1%	13,305		(13,076)
Merger Fund	109,813			108,487	(1,327)	-1.2%			(1,327)
	311,439		-	297,036	(1,097)	-0.4%	13,305	-	(14,403)
<b>Equity Securities, Value Style</b>									
Berkshire Hathaway 'B'	108,470			144,974	36,504	33.7%	-	-	36,504
T Rowe Price Small Cap Value	146,977			156,768	9,790	6.7%		533.82	9,256
NAVISTAR INTERNATIONAL, memb pledge		4/20/21	176		-				
TEXAS PACIFIC LAND CORP, memb pledge		4/20/21	1,468		-				
NAVISTAR INTERNATIONAL		06/17/21	(178)		2	1.1%			2
TEXAS PACIFIC LAND CORP		06/17/21	(1,541)		73	4.7%			73
Microsoft, Memb Pledge		12/7/21	2,344		-				
Microsoft		12/9/21	(2,338)		(6)	-0.3%			(6)
	255,447		(68.52)	301,742	46,363	18.2%	-	534	45,829
<b>Growth Mutual Funds</b>									
IShares Momentum ETF (MTUM)	100,998	01/10/22	(105,921)	-	5,541	2.7%	618		4,923
IShares Russell 2000 ETF (IWM)	57,513			53,564	(3,999)	-5.91%	550.54		(3,949)
Fidelity Midcap Stock		01/11/22	100,000	97,485	(2,515)	-2.5%			(2,515)
Fidelity Select Health	227,935			219,842	(8,093)	-3.6%	-	291	(8,384)
Fidelity Select Technology	66,875			68,201	1,326	2.0%	-	50	1,276
Vanguard Growth Index	145,401	1/10/22	(50,000)	114,527	19,126	9.8%	-	870	18,256
	598,722		(55,921)	553,618	11,986	2.1%	1,169	1,211	9,607
<b>International Funds</b>									
Vanguard International Value	136,393			137,704	(2,269)	-1.7%		3,580	(2,269)
Vanguard Admiral Int'l Growth	154,723	1/10/22	(50,000)	82,924	(21,799)	-10.6%	-	1,417	(23,216)
	291,116		(50,000)	220,628	(24,068)	-10.0%	-	4,998	(25,485)
<b>Totals</b>									
Starting Portfolio Value	2,346,337		Column totals	2,315,550	74,138	3.2%	17,794	14,425	45,499
Plus New Funds Received	47,825								
Plus Investment Return	74,138							32,219	Total Income
Less Expenditures	(152,750)								
Ending Portfolio Value	<b>2,315,550</b>								



## UU22T3 — Current investment portfolio by categories.

<b><u>INVESTMENT PORTFOLIO AS OF 3/01/22</u></b>					<b>UU22T3</b>
	<b>Symbol</b>	<b>Shares</b>	<b>Price \$</b>	<b>Value \$</b>	<b>Percent of Portfolio</b>
<b>Cash &amp; Short-Term Income</b>					
Fidelity Money Mkt Accounts		-	-	308,088	13.3%
Accounts Receivable		-	-	-	0.0%
Accounts Payable (Minus)		=	=	=	0.0%
				<b>308,088</b>	<b>13.3%</b>
<b>Fixed Assets (Gas Boiler)</b>				<b>6,100</b>	<b>0.3%</b>
<b>CD's, Bonds &amp; Bond Funds</b>					
Loomis Sayles Bond Fund	LSBDX	983.5	13.02	12,806	0.6%
Fidelity Float Rt Hi Income	FFRHX	12,103.1	9.40	113,769	4.9%
Fidelity Capital & Income	FAGIX	<u>6,192.8</u>	<u>10.67</u>	<u>66,077</u>	<u>2.9%</u>
				<b>192,651</b>	<b>8.3%</b>
<b>Growth &amp; Income Blended Funds</b>					
Fidelity Mid Cap Stock	FMCSX	2,350.7	41.47	97,485	4.2%
Fidelity Puritan	FPURX	12,679.1	25.29	320,655	13.8%
UUA Common Endowment Fund		884.3	10.95	9,680	0.4%
Vanguard Dividend Growth	VDIGX	<u>2,821.4</u>	<u>37.34</u>	<u>105,351</u>	<u>4.5%</u>
				<b>533,172</b>	<b>23.0%</b>
<b>Low Correlation Funds</b>					
EatonVance Enhanced Equity 2 Merger Fund	EOS MERFX	9,144.0	20.62	188,549	8.1%
		<u>6,238.4</u>	<u>17.39</u>	<u>108,487</u>	<u>4.7%</u>
				<b>297,036</b>	<b>12.8%</b>
<b>Equity Securities, Value Style</b>					
Berkshire Hathaway 'B'	BRK.B	451	321.45	144,974	6.3%
T.Rowe Price SmallCap Value Fund	PRSVX	<u>2,726.4</u>	<u>57.50</u>	<u>156,768</u>	<u>6.8%</u>
				<b>301,742</b>	<b>13.0%</b>
<b>Growth Mutual Funds</b>					
ISHARES RUSSELL 2000 ETF	IWN	263.4	203.32	53,564	2.3%
Fidelity Select Health	FSPHX	7,768.3	28.30	219,842	9.5%
Fidelity Select Technology	FSPTX	2,736.8	24.92	68,201	2.9%
Vanguard Growth Index	VIGAX	<u>802.1</u>	<u>142.78</u>	<u>114,527</u>	<u>4.9%</u>
				<b>456,133</b>	<b>19.7%</b>
<b>International Funds</b>					
Vanguard Int'l Value Fund	VTRIX	3,441.7	40.01	137,704	5.9%
Vanguard Admiral Int'l Growth	VWILX	<u>700.0</u>	<u>118.47</u>	<u>82,924</u>	<u>3.6%</u>
				<b>220,628</b>	<b>9.5%</b>
<b>Portfolio Total 3/01/2022</b>				<b>2,315,550</b>	<b>100.0%</b>

## UU22T4 — Analysis of the Named Funds.

Year & Source	Fund Name	Specified Purpose	ANALYSIS OF THE NAMED FUNDS				UU22T4			
			Principal 2/28/22	Restrictions by Donor			Accumulated Income in Restricted Funds			
				None	Princ.	Income	2/29/21	Income	Expense	2/28/22
1961 UU	Alliance Memorial	Flowers	200			X	24	7	31	
1939 U	Fred W. Archibald	Flowers	401			X	151	13	164	
1930 W	Sarah J. Bartlett	Flowers	100			X	248	3	251	
1994 UU	Eaton/Chase Family	Flowers	700			X	81	23	104	
1923 W	Ernest H. Griswold	Flowers	295			X	291	10	301	
1984 UU	Guild Flower Fund	Flowers	893			X	114	30	144	
1992 UU	Risdon Memorial	Flowers	3,000			X	165	101	266	
1962 UU	Sears Memorial	Flowers	250			X	57	8	65	
1990 UU	Deacon Smith Family	Flowers	2,263			X	358	76	434	
1942 U	Walter Stearns	Flowers (\$100)	7,000		X	[100]	141	3	144	
1907 B	John C. Haynes	Charity Work	7,988			X	1,591	268	1,500	359
1875 U	Eunice Harrington	Needy Poor	2,662			X	861	89	950	
1882 B	Lucy Chipman	Poor of the Church	944			X	571	32	603	
1900 B	Sarah A. Davenport	Poor of the Church	910			X	517	30	547	
1725 P	Mills Ripley	Poor of the Church	1,102			X	672	37	709	
1881 U	Polly Sanderson	Poor of the Church	2,223			X	1,180	74	1,254	
1955 U	Annie W. Smith	Poor of the Parish	11,067			X	2,586	371	1,500	1,457
1999 UU	Castner Memorial	Music	6,283			X	389	210	599	
1992 UU	David E. Clough	Music	2,030	\$200 added, Memory of Jane		X	136	68	204	
2012 UU	Irene Kallow	Music	43,054			X	2,276	1,442	1,000	2,718
1950 W	Walter F. Starbuck	Music	580			X	34	19	53	
2004 UU	Betty Lee Diggs	Music (Organ)	25,000			X	700	838	1,538	
1972 UU	Martha Abbott	Children's Library	1,400			X	454	47	501	
1996 UU	Dr. Douglas Butman	Property Maint.	30,000			X	(810)	1,005	195	
1966 W	Alice J. Mason	First Parish Guild	500			X	2	17	19	
1942 U	Alice S. Peabody	Sunday School	300			X	242	10	252	
1992 UU	Ted Jones Scholarship	UUA Scholarships	8,402			X	1,713	281	1,994	
1926 W	Alice L. Smith	Pastor's Supplement	320,655	****		X	(203)	3,187	2,889	94
2007 UU	Jones Trust	Non-Budget Initiatives	-----	**		X	65,299	47,625	39,000	73,924
1913 U	Clara Abbott	-----	500			X	79,840	55,924	45,889	89,874
1905 W	George L. Almy	-----	500			X				
1921 W	Abby E. Armstrong	-----	300			X				
1923 W	Phineas & Mary Barnes	-----	1,881	***		X				
1935 B	Mary E. Barry	-----	2,000			X				
1927 W	Fred & Mary Bryant	-----	2,450	***		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 WCRE	-----	203,891			X				
1922 U	Mary Gardner Lamb	-----	1,500			X				
1911 B	Joseph W. Leighton	-----	12,000			X				
1916 W	Alice & Arthur Mason	-----	5,349	***		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)	-----	6,100			X				
	Accumulated Income & Appreciated Value		697,544							
	<b>Grand Total, All Funds</b>		2,315,550				607,670		89,874	

Notes:-

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

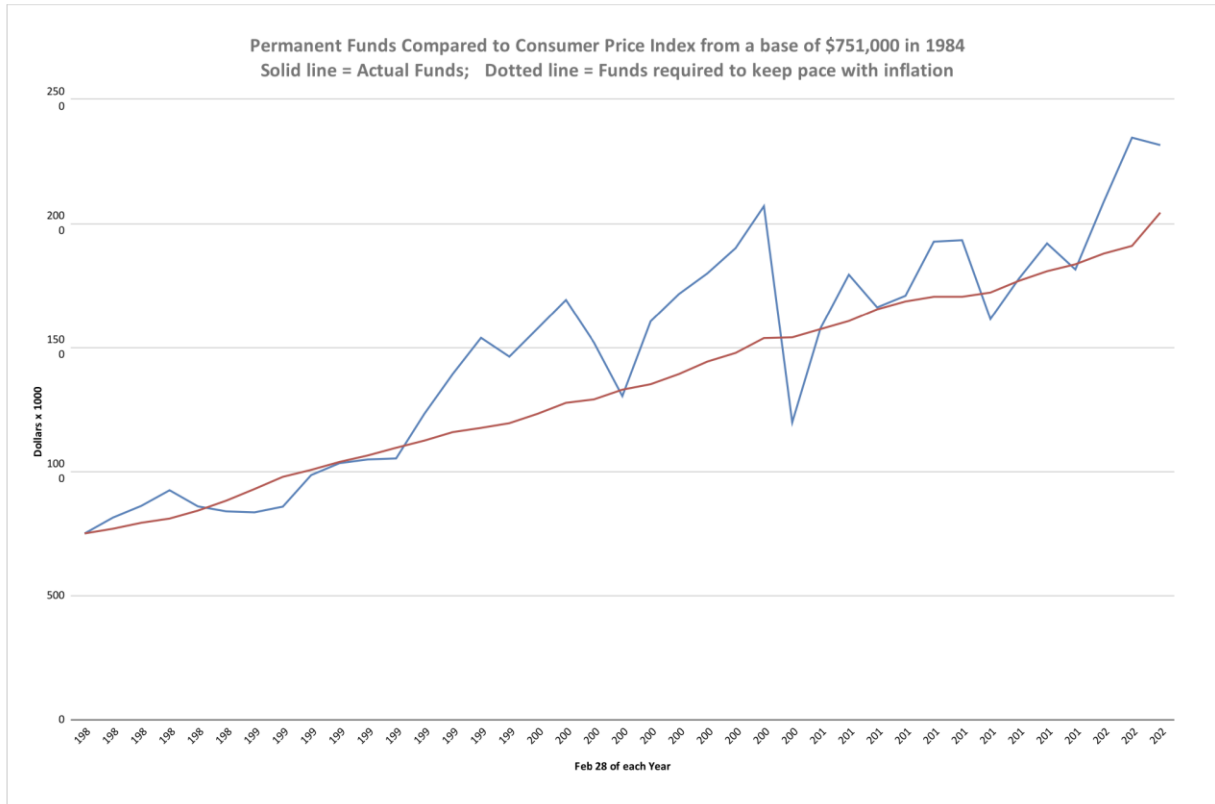
Income rate on Special Purpose Funds  
= 3.4%

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.

## Graph — Permanent Funds compared to Consumer Price Index



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 15% more than it was in 1984. While keeping up with inflation, the funds have also contributed around \$4 million to First Parish operations during these 38 years.

## **Jones Partnership Fund Grant Recipients 2021-2022**

### **African Cultural Services Inc./Africano Waltham** **\$3,000**

Sponsor: Susan Weddig

The organization's project, "Africano Holistic Health Program" will run from April 2022- December 2022. With the project, Africano will seek professional services from a qualified social worker to help the served community - mostly immigrants from Uganda - to navigate issues like: mental health, food security, medical care access, housing, and various advocacies.

### **The Cat Connection** **\$3,000**

Sponsor: Martha Gallagher

Over the years, The Cat Connection has continued to encourage families with cats to neuter/spay their pets in order to reduce the number of stray cats in Waltham. In 2022, "Spay/Neuter Assistance Program," a.k.a CatNAPS, hopes to assist challenged families with the high costs related to spaying and neutering, by reaching over twenty-five cats. But, with a \$3,000 grant, more cats can be spayed/neutered - bringing the total to over 35 cats.

### **Chaplains on the Way** **\$4,000**

Sponsor: Leslie Gildersleeve

The successful "Breakfast and Warming" program administered by COTW continues to provide nourishment, a warm place to be, religious services, and a sense of belonging to unhoused men and women in the Waltham neighborhood. The program is run at FPW and is a great opportunity for the congregation to donate and volunteer services to a meaningful cause.

### **Chesterbrook Community Foundation** **\$1,500**

Sponsor: Pam Penton

This project will build bridges between the two Learning Centers at Chesterbrook and Dana Court, by providing greatly needed support to pay for snacks and supplies. The Chesterbrook Foundation serves students living in these low income housing communities through the afterschool programs, which offer a safe place for the students to spend time after school. Many of the students' parents work multiple jobs and the learning centers provide the homework help and mentorship they might not otherwise receive.

### **Community Day Center of Waltham** **\$4,000**

Sponsor: Roberta Walz Trudeau

The Case Manager's Helping Hands Fund 2022 will focus on 1) providing transportation to homeless individuals who A) request immediate help for their addiction, i.e. transportation to detox facilities and long-term rehabilitation/recovery centers; B) request transportation to medical/dental facilities based on health concerns; C) request transportation to job interviews; 2) require IDs and birth certificates for employment and/or housing opportunities; and 3) need money to support a housing move-in. The fund will be managed by the Case Manager with the approval of the Executive Director.

### **Downtown Waltham Partnership – Steampunk Festival** **\$1,000**

Sponsor: Alice Taylor

The Watch City Steampunk Festival is a one-day free public event that uses the theme of "steampunk" to explore music, art, fashion and technology. "Steampunk" refers to a Victorian-style version of science fiction, as if we lived in a world where everything H. G. Wells and Jules Verne dreamed of came true. If there is something specific that FPW would like to do during the festival, Downtown Waltham Partnership would be happy to work with FPW.

### **Food Link** **\$3,500**

Sponsor: Donna VanderClock

Food Link partners with other organizations to help combat the food insecurity problem. They “rescue” high quality excess food from donor restaurants, and a team of dedicated volunteers help deliver this food to places where it is most needed. They are addressing two major concerns at once: reducing food waste and feeding over 600 families each month – benefitting many Waltham based organizations.

**Opportunities for Inclusion** **\$1,500**

Sponsor: Jon Taylor

Opportunities for Inclusion plans to continue and expand their efforts to provide opportunities for individuals with intellectual and developmental disabilities, to volunteer in the Waltham community. This volunteer work gives the participants a sense of purpose, and the opportunity to “give back” to the community. They plan to run a combined community service/social/dance event in the Fall of 2022.

**Waltham Boys and Girls Club** **\$3,500**

Sponsor: Leslie Gildersleeve

To continue Club Cafe - a year long program providing meals (mostly lunches) to Waltham youth. Last year 48,611 meals were provided to 2,800 youth. Participants would like to help with landscaping at the church and hope to attend a church service and engage in conversation concerning the food and nutritional needs of youth from low-income families in Waltham.

**Waltham Farmers Market** **\$5,000**

Sponsor: Dan Taylor

The goal of the program is to promote health, nutrition and personal dignity in our community by offering matching funds to SNAP/EBT recipients at the Waltham Farmers’ Market. The program will provide dollar-for-dollar matching of up to \$10 per customer per week to spend at the market. In 2021 the FM matched over \$17,000.

**Waltham High School Show Choir** **\$1,900**

Sponsor: Rachel Learned

To provide the Waltham High School Show Choir with arrangements and copy-writes for their music competitions - held regionally and nationally. The Show Choir will also perform at First Parish during a Sunday service.

**Waltham Open Studios** **\$2,000**

Sponsor: Joel Weddig

Twenty artists will interact with the community during the summer at the public library and the Museum of Industry, for an “interactive” art experience. The results of the program will be showcased at the annual Open Studio event in the fall. Also, Waltham Mills Artist Sarah Leon will give a live workshop at First Parish in the fall.

**Waltham Philharmonic Orchestra** **\$2,500**

Sponsor: Marianne Cutter

To provide an increased opportunity for students (from Waltham High School and local colleges) to rehearse and perform with the orchestra. Two free chamber music performances are scheduled in Waltham, and there will be a performance held at First Parish.

<u><b>Total Distribution for 2021-2022</b></u>	<u><b>Total Distribution Since Inception (2010)</b></u>
13 Grants	195 Grants
\$ 36,400	41 Organizations
	\$ 333,462

## Nominating Committee – 2022-23 Nominations

<p><b>Moderator</b> <i>1 year (no limit)</i></p>	<p><b>Bill VanderClock</b></p>
<p><b>Nominating Committee</b> <i>6 members, 2 years, (3 terms) selected by the Nominating Committee</i></p>	<p><b>Bee Fortin</b></p>
	<p><b>Dimitry Zarkh</b></p>
	<p><b>Nancy Lawrence</b></p>
<p><i>1 year to fill vacancy</i></p>	<p><b>Andy LeCompte</b></p>
<p><b>Clerk</b> <i>1 year (7 terms)</i></p>	<p><b>Deborah Jose</b></p>
<p><b>Treasurer</b> <i>1 year (7 terms)</i></p>	<p><b>Janet Riley</b></p>
<p><b>Asst. Treasurer</b> <i>1 year (7 terms)</i></p>	<p><b>Dan DeHainaut</b></p>
<p><b>Finance Commissioner</b> <i>2 years (2 terms)</i></p>	<p><b>Donna VanderClock</b></p>
<p><b>Membership Commissioner</b> <i>1 year to fill vacancy (2 terms)</i></p>	<p><b>Martha Gallagher</b></p>
<p><b>Religious Education Commissioner</b> <i>2 years (2 terms)</i></p>	<p><b>Pam Penton</b></p>
<p><b>Property Commissioner</b> <i>2 years (2 terms)</i></p>	<p><b>Dan Taylor</b></p>