

First Parish in Concord

Annual Report of the
Officers and Committees

For the Year Ending June 30, 2022

Concord, Massachusetts

First Parish in Concord
Annual Report
July 1, 2021 through June 30, 2022

Contents

Warrant for Annual Meeting	5
Annual Meeting Introduction.....	6
Agenda for the Annual Meeting.....	7
Annual Meeting Minutes	8
Slate of Officers	12
8th Principle Presentation	15
Greening the Campus Task Force Update.....	17
General Assembly 2022 Delegates	18
Annual Report of the Senior Minister	19
Annual Report of the Minister for Pastoral Care	21
Music Ministry Annual Report.....	23
Religious Education Program Annual Report.....	25
Facilities Manager Annual Report.....	28
SAC Program Reports.....	35
Amnesty International, Group 15.....	35
Diversity Committee.....	36
Environmental Team	37
Immigration Justice Task Force	38
Partner Congregation Committee	41
Racial Justice Action Group.....	43
Reclaim Our Democracy	45
Committee Reports	48
Standing Committee Annual Report of the Chair.....	48
Commission on Institutional Change (COIC)	49
Conchords.....	52
Congregational Life Committee.....	52
First Tuesday Group	54
Flower Committee	55
Greening the Campus Task Force	56
Humanist Council	57
Jewish Awareness Affinity Group	58

Jhamtse Buddhist Group	58
Microfinance Group	59
Ministerial Intern Committee	59
Moms Connection Group.....	60
Pastoral Care Council.....	61
Photography Club.....	61
Transcendentalism Council	62
Women’s A.M./P.M. Book Group	64
Women’s Goddess Covenant Circle	65
Women’s Parish Association	66
Women’s Retreat Planning Committee	68
Financial Reports	69
Trustees of First Parish Donations	79

Warrant for Annual Meeting

WARRANT COMMONWEALTH OF MASSACHUSETTS MIDDLESEX, SS.

To any one of the constables of the Town of Concord, GREETINGS:

You are hereby authorized and directed to notify and warn the qualified voters of FIRST PARISH IN CONCORD in said County of Middlesex, to meet on-line via Zoom meeting on SUNDAY, the 5th day of June 2022 at 11:00 o'clock in the morning, then and there to act and vote upon the following articles, to wit:

To hear and receive the reports of the Senior Minister, the Standing Committee, the Trustees of Parish Donations, and other committee reports.

To choose all Parish officers for the ensuing year.

To ratify the UU General Assembly delegate slate.

To raise money for all parochial purposes, including the Budget for Fiscal Year 2022-2023.

To grant a Historic Preservation restriction to the Town of Concord on the Wright Tavern property.

To act upon any other business that may come before the meeting.

And you are hereby directed to serve this warrant by posting copies thereof, by you attested, in at least two public places in said Town, one of which shall be at the door of the Meeting House of said Parish, eight days, including two Sundays, before said fifth day of June, and to have this warrant, with your doings thereon, at said meeting.

Witness our hands this 15th day of May in the year two thousand twenty-two:

(PLEASE NOTE: because we will also be conducting this meeting online in accordance with the Commonwealth of Massachusetts Executive Order Suspending Certain Provisions of the Open Meeting Law, the Chair will sign on behalf of the entire Standing Committee, each of whom have provided electronic approval of this Warrant).



Elizabeth Rust, Chair, on behalf of:

CC King, Vice Chair

Jennifer Izzo, Clerk

Heather Pickard, Treasurer

Michael Beer

Jim Hawks

Gib Metcalf

Caroline Minkin

Susan See

Jim Reynolds

Virginia Taylor

Annual Meeting Introduction

Welcome to the First Parish Annual Meeting
Sunday, June 5, 2022, at 11:30 a.m., at First Parish and on Zoom.

The First Parish Annual Meeting is your opportunity to participate in the open and democratic process of deliberating and voting on the business before the church and this congregation.

If you are new to Annual Meeting, it uses the conventions of Town Meeting to organize your debate.

1. Most of your work can be done with four motions
 0. Propose action that pertains to the article: Main motion “I move that ... “
 1. Modify a proposal: Move to amend (or substitute) “I move the pending motion be amended (or substituted) ...”
 2. Call for a vote: “I move the previous question”
 3. Get clarification: “Point of order”
2. When you are deliberating on a motion, the role of the moderator is to recognize speakers. Your remarks are always addressed to the moderator, not to other attendees. That’s the meeting convention.

You can attend the meeting in person or on Zoom. The Annual Meeting’s Zoom link can be found in the First Parish weekly e-mail. Each attendee will be admitted to the Zoom meeting if they have signed the membership book and become a Member at First Parish.

About how we will use Zoom

1. In support of the articles, there may be remarks and presentations by staff and members of the congregation.
 0. During presentations, if you have a clarifying question, please type it in the chat, visible to everyone.
2. When you are deliberating on a motion, the Moderator recognizes speakers.
 0. If you wish to speak, use the raise your hand option at the bottom of the screen. The Moderator will recognize you and you unmute.
3. For Zoom attendees, you will vote using the polling feature. One of Zoom limitations is there isn’t a way to count more than one vote per logged in device. If there are two or more voting members in your household, you may log in on separate devices and you will each have a vote.

Agenda for the Annual Meeting

First Parish in Concord
Annual Meeting Agenda
June 5, 2022 11:30 a.m.

- A. Meeting Call to Order: Moderator Kristin Moore
- B. Opening Prayer: Reverend Howard Dana
- C. Introduction of Articles: Moderator Kristin Moore
 - I. To hear and receive the reports of the Senior Minister, the Standing Committee, the Trustees of Parish Donations and the FP Commission on Institutional Change. Motion by Liz Rust, Standing Committee.
 - a. Senior Minister: Rev. Howard Dana
 - b. Standing Committee: Liz Rust
 - c. Trustees of Parish Donations: Philip VanderWilden
 - d. FP Commission on Institutional Change: Toby Smith Ropeik
 - II. To choose all Parish officers for the ensuing year
 - a. Slate for Standing Committee and Officers: Motion by Kristin Haddad, Nominating Committee
 - b. Slate for Nominating Committee: Motion by Liz Rust, Standing Committee
 - III. To ratify the UU General Assembly delegate slate: Motion by Jan Power
 - IV. To raise money for all parochial purposes, including the Budget for Fiscal Year 2022-2023: Motion by Treasurer Heather Packard
 - V. To authorize the Senior Minister, or the Chair of the Standing Committee as their designee, to grant a perpetual Historic Preservation restriction with the Town of Concord for the Wright Tavern property, such property as defined in the restriction, similar in form to the one presented. Motion by Tom Wilson
 - VI. To adopt the 8th Principle at First Parish in Concord, Mass: Motion by Sally Lewis and Sue St. Croix
 - VII. To act upon any other business that may come before the meeting.
- D. Closing: Moderator Kristin Moore

**Annual Meeting Minutes
First Parish in Concord
Minutes of the Annual Meeting
For the Year Ending June 30, 2022
June 5, 2022 at 11:30AM**

The Annual Meeting of First Parish was called to order at 11:30AM by Moderator Kristin Moore. The meeting was held both in person in the Parish Hall and remotely via Zoom. Ms. Moore reviewed the format and protocol for the meeting. The Reverend Howard Dana opened the meeting with a prayer.

Kristin Moore introduced the Articles for the Meeting.

Article I: To hear and receive the reports of the Senior Minister, the Standing Committee, the Trustees of Parish Donations and the FP Commission on Institutional Change.

Upon motion duly made and seconded it was

VOTED: To hear and receive the reports of the Senior Minister, the Standing Committee, the Trustees of Parish Donations and the FP Commission on Institutional Change.

Senior Minister's Annual Report: Howard Dana

Rev. Dana's report was made available electronically prior to the meeting. He discussed the impact that the second full year of the Covid-19 pandemic has had on his ministry and the congregation. Covid-19 played a major role in his decision to leave First Parish. Rev. Dana stated that he is confident that he is leaving the church in a good place. Overall, we are a kinder congregation than when he first arrived. The Standing Committee is functioning well and we will begin a two year interim ministry with Rev. Seth Carrier-Ladd.

Standing Committee (SC) Report: Liz Rust

Liz Rust shared an overview of the Standing Committee's report, which was made available electronically.

Trustees of Parish Donations Report: Laura Bernstein

Laura Bernstein shared a report from the Trustees of Parish Donations.

FP Commission on Institutional Change: Toby Smith Ropeik

Toby Smith Ropeik shared a report on the Commission on Institutional Change.

Article II: To choose all Parish officers, Standing Committee, and Nominating Committee Members for the ensuing year. Liz Rust, Standing Committee. Kristin Haddad, Nominating Committee.

Upon motion duly made by and seconded, it was

VOTED to nominate the following candidates for the terms noted:

Standing Committee:

Members-at Large

Carolyn King (second 3-year term)

Liz Rust (second 3-year term)

Susan See (second 3-year term)

Officers:

Jennifer Izzo, Clerk (second one year term)

Heather Packard, Treasurer (second one year term)

Tom Wilson, Moderator (first one-year term)

Nominating Committee:

Leanne Baxter (second 3-year term)

Kristin Haddad (second 3-year term)

Article III: To ratify the UU General Assembly delegate slate.

Upon motion duly made and seconded it was

VOTED to ratify the following 2022 UU General Assembly (GA) delegate slate:

Sarah Ballard

Liz Rust

Chuck MacDonald

Susan See

Peter Nobile

Darien Smith

Jan Power

Lois Suarez

Article IV: To raise money for all parochial purposes, including the Budget for Fiscal Year 2022-2023.

Ms. Packard provided an overview of this year's Annual Pledge Campaign results. She acknowledged the hard work of everyone who worked on the Pledge Campaign, led by Tim Whitney, Project Manager.

The FY23 budget will be \$1,272,106, based upon receipt of \$940,900 in pledges, \$145,536 in Trustees' income, a large gift of \$80,000, \$51,300 in other Contribution income, \$13,670 of miscellaneous other income, and \$40,700 in rent/fees from tenants. Overall, the pledges, gifts

and income is down by \$45,692 from the prior year. The total shortfall of Net Income is - \$169,986.

Ms. Packard stated that the shortfall will be covered through use of the prior year's surplus. The surplus had grown through good fiscal management and the generosity of the congregation. It was intended to act like a "rainy day fund." At the beginning of the year, the surplus amount was \$152,918. All of this amount will be applied to the FY23 budget to offset the short-fall. By the end of FY23, no surplus will remain. Ms. Packard explained that the rationale for using the entire surplus this year is that Covid-19 and the departure of Rev. Howard Dana together truly qualify as a "rainy day." First Parish now needs to rebuild its financial cushion and balance its budget.

Upon motion duly made by Heather Packard and seconded, it was

VOTED: To raise money for all parochial purposes, including the proposed Budget for Fiscal Year 2022 as noted above.

Article V: To authorize the Senior Minister, or the Chair of the Standing Committee as their designee, to grant a perpetual Historic Preservation Restriction with the Town of Concord for the Wright Tavern property, as the term property is defined in the Restriction, similar in form to the draft Restriction provided in advance of the meeting.

Tom Wilson reported that the Wright Tavern is a national historic treasure. It is a major site in the founding of our country, yet it does not currently appear on any Concord tourist map, nor is it discussed on Concord tours. Currently, there are no binding requirements to protect the interior, historic elements of the Wright Tavern. The building currently needs many repairs and improvements. According to a 2019 Structure Report, the required repairs are estimated to cost \$800,000-\$1,200,000. Recently, major problems with the roof structure were found.

The Wright Tavern Legacy Trust, established in 2021, believes that First Parish has a responsibility to preserve and protect this National Historic Landmark. The Legacy Trust developed a 4-year strategic plan to create an engaging experiential museum that tells the stories of the Wright Tavern and Concord, and to develop a Center for the Exploration and Renewal of Democracy. The Trust has received two grants totaling \$494,400 from the Town of Concord to pay for one-third of the critical repairs, but the funding comes with the requirement to enter into a Preservation Restriction Agreement for the property.

Mr. Wilson explained that the Preservation Restriction will run with the land in perpetuity. First Parish will not be permitted to make changes to identified historic elements of the property (10 exterior and 150 interior elements) without approval of the Concord Historic Commission and/or the Historic Districts Commission. First Parish (through the Legacy Trust) must provide public access to the first floor of Wright Tavern during regular operating hours set by the Legacy Trust. The Legacy Trust will manage the design, repairs and improvements to the Wright Tavern in accordance with its Strategic Plan and the Preservation Restriction Agreement. They will also develop a fundraising capital campaign for the property.

Upon motion duly made by Tom Wilson and seconded, it was

VOTED: to authorize the Senior Minister, or the Chair of the Standing Committee as their designee, to grant a perpetual Historic Preservation Restriction with the Town of Concord for the Wright Tavern property.

Article VI: To adopt the 8th Principle at First Parish in Concord, Mass.

Sally Lewis and Sue St. Croix discussed the adoption of the 8th Principle at First Parish as a means to live out our mission of “transforming ourselves, our community and the world through acts of love and justice.” The 8th Principle states: “We, the members of First Parish In Concord, covenant to affirm and promote: journeying toward spiritual wholeness by working to build a diverse, multicultural Beloved Community by our actions that accountably dismantles racism and other oppressions in ourselves and our institutions.”

Upon motion duly made by Sally Lewis and Sue St. Croix and seconded, it was

VOTED: to adopt the 8th Principle at First Parish in Concord, Mass

Article VII: To act upon any other business that may come before the meeting.

There was no other business before the meeting. A motion was made to adjourn and to dissolve the Annual Meeting The motion was seconded and approved with a unanimous vote, and the meeting was adjourned at approximately 1:30PM.

Respectfully submitted,

Jennifer Izzo, Clerk

Slate of Officers

FIRST PARISH IN CONCORD

2020 NOMINATION OF OFFICERS OF THE PARISH; MEMBERS OF THE STANDING COMMITTEE.

- o Pursuant to Article V of the Bylaws of First Parish in Concord, the membership is hereby notified of the slate of nominees for election as officers of the Parish and members of the Standing Committee commencing 2022-23.
- o Members will be asked to vote on the slate at the Annual Meeting on June 4, 2022.
- o Respectfully submitted by the Nominating Committee of Leanne Baxter, Jeff Brainerd, Lora Brown, Kristin Haddad,, Mark Russell Prior, Darien Smith and Susie Weaver.

Liz Rust | *Member at Large (Second 3-year term)*



Elizabeth Rust has been coming to First Parish of Concord since she moved to Concord in 2016 and became a member in 2017. Liz is a member of the Congregational Life Committee (CLC) and was previously involved with the Social Action Council and the 'Share The Plate' Program. Liz comes to Concord from First Parish of Sudbury where she was an active member for almost 20 years, holding many officer and volunteer positions including Trustee and Treasurer. Liz volunteers with Concord Prison Outreach, as a board member and Treasurer. Liz works as the Director of the Regional Housing Services Office, a local municipal collaboration in support of affordable housing.

Carolyn King | *Member At Large (Second 3-year term)*



CC King has been active with First Parish since the 1970's. Some of her more recent involvement includes: co-chairing the Racial Justice Action Group, mentoring for the Coming of Age program this year, singing with CVE whenever possible, facilitating the Cancer Support Group, serving on the Grants Committee of the Social Action Board for many years, serving on the boards of the Jericho Road Project and in the past, the Greeley Foundation, activism with the climate justice initiatives at First Parish. She is also active with Concord's Earth Day, as a leader and co-founder. CC leads classes, workshops and retreats for adults and for elders with dementia using improvisational methods for personal expression and for building safe community.

Susan See | *Member At Large (Second 3-year term)*



Susan See has been a member of First Parish since 2014 after moving to Massachusetts from the Midwest. She has been a member of the Diversity Committee, Racial Justice Action Group (RJAG), the Annual Pledge Campaign Committee and has served as a COA mentor and First Parish delegate to the UUA General Assembly. Susan currently serves on the Congregational Life Committee and Ferry Beach Committee. She especially enjoys annual gatherings at Women's Retreats and Ferry Beach. Susan is dedicated to work that enhances First Parish connections and belonging. After retiring from a career in volunteer management, human resources and camp/outdoor program management, Susan began working online in customer service support.

Jen Izzo | Clerk (Second 1-year term)



Jennifer Izzo has attended First Parish for approximately 15 years. She taught RE classes for several years and attended Ferry Beach several times. She has served on a variety of committees, including the Nominating Committee and Sounding Board. She was an active member of Advocates for Women's Empowerment. She ran 2 fundraising auctions for the church. She also organized several workshops for the church community, including a Wellness Program for Women, yoga classes for FP moms and a Mother-Son Cooking class. In 2017, she arranged for 2 buses to take First Parish members and friends to Washington DC to join the Women's March. Outside of church, Jennifer and her husband, Pete, are parents to 3 boys. She is an in-house attorney at a medical device manufacturer.

Heather Packard | Treasurer (Second 1-year term)



Heather Packard has been a member of First Parish since 2008. She and her husband live in Concord and have three children: Sarah, Brian, and Meg. For last church year Heather served as the Treasurer on the Standing Committee and as the Communications Coordinator for the Annual Pledge Campaign. She regularly volunteers with RE including volunteering for years as a Little RE attendant, teaching regular RE classes, twice as a Little OWL teacher, and mentored COA spring 2021. Heather's professional background has included financial management and bookkeeping for several nonprofits. In these roles, Heather provided monthly financial reporting and developed annual expense, revenue, and capital budgets.

Tom Wilson | Moderator (First 1-year term)



Tom has been a member of First Parish since 1998. Tom has participated in a number of plays, programs, events and was a member of the First Parish Choir and the Contemporary Ensemble. He loves being engaged in activities that support the community and the First Parish mission. He has served in several leadership roles as well. Tom became a member of and then Chair of the Social Action Committee. He also co-led the project team to install the new organ in the Sanctuary. In 2014 to 2016 Tom was elected Treasurer of First Parish and then served on the Standing Committee for an additional three years. In 2019 Tom chaired the Wright Tavern Futures Task Force and is now serving as Chair of the Wright Tavern Legacy Trust Board and contributing to the renew of the Wright Tavern. Tom has been a Steward for the pledge campaigns for over five years. Tom also served as the temporary Moderator for the Annual Meeting where the congregation called Rev. Howard Dana to be our Senior minister. He truly loves this community, and the opportunities First Parish provides to him and others to be engaged and strengthened. He lives with his wife, Martha, and dog Ollie in Concord

FIRST PARISH IN CONCORD

2020 NOMINATION OF MEMBERS OF THE NOMINATING COMMITTEE.

- o Pursuant to Article V of the Bylaws of First Parish in Concord, the membership is hereby notified of the slate of nominees for election as members of the Nominating Committee commencing 2022-231.
- o Members will be asked to vote on the slate at the Annual Meeting on June 4, 2022.
- o Respectfully submitted by the Standing Committee of First Parish.

Leanne Baxter | *Nominating Committee (Second 3-year term)*



Leanne Baxter has attended First Parish with her husband Ethan, and their two children, Katie and Jonathan, since 2012. She has taught RE, served on the auction committee, and been an elf at the holiday craft fair. After many years working in brand marketing at Welch's, Leanne recently transitioned to a small marketing agency where she will deliver innovative marketing programs to her clients. Leanne and her family live in Acton, and prior to that, she and Ethan lived in California for seven years. She was born and raised in Concord and though she attended the TriCon church growing up, she could see both the TriCon and First Parish steeples from her bedroom window.

Kristin Haddad | *Nominating Committee (Second 3-year term)*



Kristin Haddad has attended First Parish with her husband, Mark and their children Sydney and Andre since 2011. She started her First Parish involvement on the Ministerial Intern Committee and has since been a member of the Standing Committee, a pledge campaign steward and is completing her first term on the Nominating committee. She has enjoyed Ferry Beach, the women's am/pm book club and being involved in RE. She appreciates the multigenerational aspect of our church community, along with the opportunities for social action and raising social awareness this provides.

8th Principle Presentation

8th Principle

The 8th Principle states:

We, the members of First Parish In Concord, covenant to affirm and promote: journeying toward spiritual wholeness by working to build a diverse, multicultural Beloved Community by our actions that accountably dismantle racism and other oppressions in ourselves and our institutions.

Background for 8th Principle

- Paula Cole Jones, member of All Souls Church Unitarian in Washington DC, Bruce Pollack-Johnson, congregant at UU Church of the Restoration in Philadelphia, developed the 8th Principle in 2013.
- They realized that a person could believe they were being a “good” UU and still not think or do anything about racism and other systemic oppression.
- Together they crafted the wording as noted above. It has been endorsed by BLUU (Black Lives of Unitarian Universalism) and DRUMM (Diverse Revolutionary UU Ministries).
- To date, it has been adopted by over 150 congregations and UU groups as a grass roots effort.

What is the process for adoption of the 8th Principle by the Unitarian Universalist Association?

- An Article II Study Commission has been established by the UUA to review the principles and purposes. Paula Cole Jones, co-author of the 8th Principle, is a member of the commission.
- IN THE MEANTIME – We are being asked (Paula Cole Jones, BLUU, DRUMM) to implement the 8th Principle NOW to intentionally express our commitment to anti-racism, join the other UU congregations around the country who have adopted this principle,

What might change as a result of First Parish adopting the 8th Principle?

- We will work together to uncover and change barriers to inclusion. Some of the work will likely be based in collaboration with the Commission on Institutional Change (COIC).
- First Parish has already been making changes in the direction of becoming a more inclusive community with greater diversity of music and musicians, readings, RE offerings and responsive social justice and outreach.

Greening the Campus Task Force Update

Greening the Campus Task Force Update:

Collaborating with the Trustees and Wright Tavern Task Force to implement the 6/20 Annual meeting vote to get FPC off fossil fuels.

- The Sanctuary has been insulated.
- Energy efficient lighting has been installed in the church
- The Trustees are insulating all four of the cottages (last roof this summer) R-13 walls R-32 ceiling
- We are providing measurements of CO2 levels during church services
- Once LN **prepares specifications and we receive bids for a design-build contract**, we will come back to the congregation for guidance on going forward with fund raising to implement the recommendations
- We have hired LN Consulting, a mechanical engineering firm from Vermont, to make recommendations on an HVAC system which would get us off of fossil fuels.
- We hired Nashawtuc Architects to work with LN and address Historic District Commission compliance issues
- We hired a commissioning agent whose task will be to assure that of the systems proposed work as designed, a well driller firm to assess groundwater depth for a potential geothermal system, and a blower door/infrared testing firm to assess potential air leaks for our energy model of the campus.
- We are thankful to the congregants who have donated their time and funds to get the project to its current state and hope to provide a further update to the congregation this fall. Your continued support and participation is greatly appreciated.

General Assembly 2022 Delegates

To ratify the UU General Assembly delegate slate:

Motion by Jan Power

Sara Ballard
Chuck McDonald
Peter Nobile
Jan Power
Liz Rust
Susan See
Darien Smith
Lois Suarez

Annual Report of the Senior Minister

Rev. Howard N. Dana

The second full year of COVID ministry was a little better than the first. The pandemic affected every part of church life. The congregation will spend years recovering. And the pandemic will go on into next year. As we continue to receive mixed messages about COVID from our governmental agencies, the virus will continue to disrupt life and force difficult measures at church. Though it took a great deal of effort, I am glad we reopened the church building in September 2021. It has been nice to see more people return, even though masking has been required inside continuously. By counting people who came to worship in-person, online, and through YouTube, our Sunday attendance numbers were pretty good. What was lost was a sense that all those people were ever together. The church staff and I tried to make it easy for people to engage with church from home—maybe too easy. There are many who still prefer to stay home for a variety of reasons. We who lead the services are happy for those who show up in-person. I have been especially grateful to the choir and other musicians who have made Sunday mornings more joyful. But it has been hard to see in-person church attendance down for so long.

Returning to the building also brought enormous stress. At each stage of the reopening we had to grapple with what we could do to make it safer from COVID. These decisions engulfed and overwhelmed the staff and me. We had some people who were mad that we were not opening faster and making masks optional. Other people were mad that we opened at all, accusing us of trying to get people sick. From masking all the time, prohibiting food and drink inside, running air purifiers constantly, and enforcing social distancing, the return to church was difficult. And little-by-little we got used to being together again. We got to a point where we could relax the social distancing some, taking the blue painter's tape off the pews in the sanctuary. But we still kept the windows open during church all winter long. One Sunday it was possible to see one's breath in the sanctuary by the end of the service! And we huddled outside all winter for coffee hour, grateful for the two fire tables we had purchased. Yet some in the congregation complained that the services were not "joyful" enough. I felt as if people in the congregation were living different realities all year long, especially those privileged enough to stay home all the time and engage with church from afar.

Despite COVID, we accomplished much as a congregation. Zoom allowed groups and committees to continue meeting. We switched from online services with off-site tech people to livestreamed services with on-site tech people. We have been fortunate to have two camera operators who have faithfully livestreamed the service each week from the balcony. Religious Education used the tent in the herb garden for their programing, coming into the Parish Hall during the coldest weather. The choir began rehearsing in the sanctuary and singing during the services. The ushers began their work again. To help with congregational cohesion, a Congregational Life Committee was formed last year. Their work this year was much appreciated. We also had good conversations about the membership process. After a long hiatus, some new people joined the church. Likewise, the Commission On Institutional Change got its start this year. We will hear more from them in the coming years. The Wright Tavern

Legacy Trust accomplished much to make that historic structure more accessible to the public. And the steeple was painted this fall and it looks terrific!

The Annual Pledge Campaign was especially challenging this year. Many in our congregation proved themselves to be generous, as usual. One of our most generous families gave us \$1,000,000—half of which went into our investments and half boosted improvement efforts and operations. With the use of our surplus pledges from prior years, we will be able to operate next year at the same high level. Despite good efforts during the pledge campaign, First Parish in Concord is still dangerously dependent on its largest donors. Too many in the congregation give at a level well below their capacity. More than 100 households ignored the Pledge Campaign completely this year, pledging nothing for the coming year. If steps are not taken to increase pledging or raise additional funds, the congregation will face a funding crisis. We cannot keep asking for more money from fewer people. A future decrease in staff and programming looks likely.

There were staffing challenges this year, too. Adrienne Betancourt gave notice and left her position as Social Action Manager in September. That position was filled by January with Rev. Paul Langston-Daley taking the job. Unfortunately, Paul was injured by a car as he crossed the street in Concord Center and spent two months recovering. Church Administrator Sarah Burns suffered a concussion in August and spent two months recovering. She gave her notice and finished up her work in May. We will leave Sarah's position open until at least September.

By March, I had decided this would be my last year as Senior Minister at First Parish in Concord. Having spent time in spiritual direction and talking to colleagues, I came to this difficult decision. COVID played a role in my decision. Like others on staff, I am exhausted and cannot go on at the pace the church wants. I sometimes joke that First Parish in Concord is stuck in high gear. It feels like that. The pressures of doing more and more during a global pandemic were too much for me. While many in the congregation were incredibly kind and patient, the stress of the pandemic seemed to make others behave badly. I needed to leave my position to rest and rejuvenate in ways I could not while continuing my ministry here. As I finish up my work, I am trying to leave the congregation in a good place. Overall, we are a kinder congregation for my time as minister. The Standing Committee is functioning well and can lead the congregation forward. As First Parish begins two years of interim ministry with Rev. Seth Carrier-Ladd, I wish it well. I will miss many people at First Parish in Concord.

Respectfully submitted, Howard

Rev. Howard N. Dana, Senior Minister

Annual Report of the Minister for Pastoral Care

Rev. Liz Weber

This year, we had hoped for some routine and some coming out of pandemic life. In some ways, that happened. But even the normalcy had its quirks. We returned to our sanctuary for worship services, while still streaming onto Zoom and YouTube for people who needed or preferred to be home. We got used to imagining each other's smiles through our masks. We enjoyed coffee hour together, but always outside. And some people continued to participate only online.

The pandemic has continued to take a toll, including far too many deaths. And yet we have continued to choose to be part of this spiritual community together. This is my third year with you, helping you to nurture your spirits and seek more justice in our world.

I have provided direct pastoral care to individuals and in small groups, supervised our robust teams, partnered with Beth Norton for occasional vespers services, teamed up with Virginia Taylor to offer a conversation series on wealth and class at First Parish, preached and prayed on Sundays, and generally done my best to be of service as needed.

We revived our new member course this fall with our Welcome/Re-Welcome series. Lillian Anderson, Liz Rust, and I built the three-session course to strengthen connections with newcomers and friends of First Parish. Themes include building relationships in the group, sharing personal spiritual journeys, and learning more about First Parish and Unitarian Universalism. The course concludes with an invitation to consider becoming official church members. We had about a dozen participants and will offer it again next year. This work has been part of the Congregational Life Committee's umbrella.

Our COVID team continued to meet, following the changing science and case counts through the Delta and Omicron waves. At the team's core were myself, Rev. Amy Freedman, and Beth Norton. For each meeting, we invited others into the conversation as needed. Sometimes this meant a whole staff discussion, sometimes specific program leaders. Typically, we asked for guidance or affirmation from our lay leaders – Dr. Bill Taylor (a retired public health epidemiologist), Emily Drazen (family nurse practitioner), and Rick Moore (who has followed aerosol and ventilation science). Who would have ever thought this would be part of church life!

This spring, we shifted our COVID team to a shared ministry between staff and lay leaders. Current team members are Heather Packard and Susan See (Standing Committee reps), Rick Moore and Dr. David Venesy (who know more about the science), and myself (convener and staff rep). We have just begun but are finding our rhythm.

First Parish interest groups continued online and/or in person. The First Tuesday Group, with co-chairs Anne Fortier and Nancy McJennett and steering committee members Linda Benua, Mary Clarke, Nancy Cronin, Rev. Margie King Saphier, Jack Nevison (publicist), and myself as ministerial advisor offered a range of programs focused on the spiritual needs of people age 55 and up. The Buddhist Group continued with two meeting times each week. Dana Snyder-Grant has offered metta meditation weekly. Both drew a mix of parishioners and non-members.

Most of our regular pastoral care ministries continued through the pandemic. I am grateful to all of you who offered your time and attention to your fellow parishioners!

Pastoral Care Lay Ministers work directly with me to respond to acute pastoral needs as well as meeting approximately monthly with people who need ongoing support. Lay Ministers are Paula Adelson, Sally Brandon Bemis, Diane Clapp, Lori Gill-Pazaris, Peter Nobile, Dana Snyder-Grant, Virginia Taylor, and Rebecca Winborn.

We continued the Cancer Support Group facilitated by CC King, the Caretakers Support Group facilitated by Diane Clapp, and the Parents Support Group facilitated by myself.

The By Your Side Singers, our pastoral choir under the direction of Beth Norton with support from Dana Snyder-Grant, brought comfort to ill or isolated parishioners even through a screen where usually only one voice could be heard at a time. They have recently offered their first in-person sing in a long time!

Meals prepared by the Open Table food pantry were available for parishioners experiencing surgery, illness, or bereavement. Enid Boasberg, Bev Bringle, Pat Kane, Petra Betts, and Marian Stanley were our delivery team.

Our Prayer Shawl Knitters and New Baby Welcomer continued to be of service. Ingrid Wheeler and Lois Whitney headed up the knitters, and Louisa Paushter was our baby welcomer. Shawls were delivered to many parishioners, and baby blankets to our newest member, both often with other comfort items such as meals. We also have heart pillows made by our RE kids a few years ago, a sweet alternative to the prayer shawls.

Our Holiday Plant delivery continued this year at Christmas and Easter with a focus on bereaved and/or isolated members. The program was coordinated by Linda Reynolds, Caitlin Selle, Ellen Whitney, and myself. Many, many people volunteered to make deliveries. The Women's Parish Association and individual donors funded the plants.

The Holden Fund continued financial support to church members and Concord residents who are caregivers for homebound family members and are experiencing financial need. The Fund's panel was Linda Reynolds, Alice Van Deusen, Rev. Howard Dana, and myself.

The Pastoral Care Library remains available and in good shape.

When Rev. Howard Dana announced his resignation this spring, I was saddened. But I am also optimistic about the road ahead. As we consider the interim period, I am glad to be here. I offer my steadiness and my willingness to look together at big questions in your lives, our church, and our world.

Music Ministry Annual Report

Elizabeth Norton
Director of Music and Arts Ministry

A dear friend has spent significant time doing research that involved reading congregational annual reports from past generations. Once, I was complaining about the task of writing a report about the year just past for people who had lived the experience, and who probably wouldn't read it anyway. And my wise friend offered the perspective that the real audience for an annual report is the people generations later who will want to know what happened "back then." So, in this May of 2022, I write with the awareness that we are living a very particular time in history and that the story of our adaptations this year might be of interest to readers a generation or more from now.

The central challenge for the First Parish Music Ministry this year, as we returned to offering in-person services in September, was how to sing together with as little risk of COVID transmission as possible. Guided by information from the International Coalition Performing Arts Aerosol Study we adopted a five-part COVID transmission mitigation strategy, which was implemented for choir rehearsals and services. I even created a vocalize, Va-Ma-Di-Ven-Ti, sung on a major arpeggio, as a mnemonic device to remember the 5 aspects: Vaccination, Masking, Distance, Ventilation and Time. All choir members covenanted to be fully vaccinated. We purchased singing masks. We spread out on the two sides of the balcony and kept 6 feet distance for most of the year. And we shortened the amount of time spent singing in one space. I also offered an option for choir members to attend rehearsal on zoom. From September through March, we limited (masked) congregational singing to one hymn on Sunday – and humming for Spirit of Life and Find a Stillness led by a song leader. As we approached Easter, we added a second hymn and folks had started singing (masked) all the congregational hymns. While masking was onerous for many, it allowed us to sing together. The experience of singing live is vital in our community. Some highlights of our year were a Yuletide Concert in December (live and on YouTube), singing the Hallelujah Chorus together at Easter, and recording two new compositions of mine in May. A hymn-focused Sunday devoted to the stories behind some of our hymn tune names served as our Music Sunday in May.

Parish Organist Eric Huenneke, adapted to the changing conditions with poise and creativity. While we were only singing one hymn in services, Eric supplied lovely "Centering Music" to bring us into worship where we would normally have sung a hymn. And he adjusted to changing expectations as the year progressed. One change Eric made was to shift his work schedule so that his two months off were in January and February, rather than the summer. During those two months, Miranda Loud and Mary Jane Rupert filled in ably (while wearing many layers to keep warm – the windows were open all winter!) and it was a pleasure to work with both of them. Having Eric "on the bench" in the summer will allow for some welcome continuity during our summer services in 2022.

Our Pastoral Choir, the By Your Side Singers, began multi-platform rehearsals in the fall. Singers were back to singing in person, masked and distanced, with the option to sing along on Zoom. It

was so good to be back singing together! We have continued to do Zoom sings this year on a regular basis. During January and February, while we weathered another COVID surge, we returned to fully on-line meetings. Getting back together live in March was a treat. And an even greater treat to was to do our first live zoom sing (masked and distanced) in April!

Our music ministry for elementary school aged children has continued to evolve and adapt this year – just as the Religious Education ministry adapted to changing COVID conditions, keeping children’s safety in focus. Brendan Ferrari and Anderson Manuel worked closely with Rev. Amy Freedman and Dawn Van Patten to provide music for family services and musical activities during some RE classes. Brendan and Anderson also helped with music leadership in the Sanctuary for Sunday worship whenever called upon. Their creativity, spirit and cheerful flexibility have been a great asset in this challenging year.

The Youth Gospel Choir returned to live rehearsals this year, with Anderson Manuel directing and Jennifer (Minjing) Vandenbos on keyboard. The joy they brought to the congregation on the Sundays when they sang in worship was palpable. They reminded us of the spirit in our youth and our youth programs and that even though we didn’t see our young people every week, as we’ve been accustomed to doing, they are a vital part of our community.

Rise Up Singing, our monthly folk music group, also showed great determination to sing in person despite the challenges of COVID and the weather. In September through December (yes, December) we met outdoors on the Keresztúr Patio, with lights set up by Rick Moore and, as the season progressed, fire tables to provide extra warmth. I will always remember December 2021’s “Rise Up Caroling” around the fire on the patio. It was physically cold, but spiritually so warm. In January, we moved inside to the Sanctuary (masked and distanced) with windows open and fans keeping the air flowing – and a Zoom option for those who wanted to attend from home. It was still chilly, but we were at least sheltered from the elements. At this writing we are returning to the Keresztúr Patio for the warmer months and allowing masks to be optional.

Throughout this challenging and exhausting year of COVID ebbs and surges, the creativity and dedication that First Parish musicians and staff have shown to keep making music together has been amazing. There is real vitality in our music ministry and our congregation, despite the challenges of these last few years. I have faith that this vitality will lead us into a still-to-be-understood future with imagination and love.

Religious Education Program Annual Report

Religious Education Annual Report 2022

2021- 2022 Religious Education at a Glance

First Parish in Concord
Unitarian Universalist

Religious Exploration:

Group	Fall	Winter	Spring
Ages 0- Grade 5	[Outdoors] 9:30-9:55am Family Service 10-11am Religious Exploration	[Parish Hall; January online] 9:30-9:55am Family Service 10-11am Religious Exploration	[Outdoors] 9:30-9:55am Family Service 10-11am Religious Exploration
Grade 5	Sexuality Education 5 Sunday sessions		
Grade 6, 7, 8	Junior Youth Group		
Grade 8		Sexuality Education 2 weekends	
Grade 9	Coming of Age		
High School	High School Youth Group		

Family Events:

Museum of Russian Icons- August 12
Homecoming Picnic- Sept. 12
Autumn Equinox- Sept. 23
Carlson Orchards Apple Picking - Sept. 26
Hugh Cargill Garden Clean-up- Oct. 17
CROP Walk- Oct. 17
Sleepy Hollow Tour- Nov. 7
Holiday Party in Topia- Dec. 14
Christmas Caroling- Dec. 17
Valentine's Day Cookie Swap- Feb. 13
Easter Egg Hunt- April 17
Scavenger Hunt at Minute Man Park- April 24
Mother's Day Peace Walk- May 8
May Fair- May 14

Parent Sessions:

Parent Circle: Back to School Roadmap- August 18
Parent Meet-up- August 28
RE-Quest- January 12, 20, 23
Bi-weekly Support Group- Liz Weber

All Ages Services:

Christmas Eve- Dec. 24, 4pm
"All Our Lives"- April 3
Easter Sunday- April 17
Coming of Age- May 1
Flower Communion- June 12
Farewell to Howard- June 19

Outreach:

Back to School postcards
Winter Holiday cards
Care Packages for 18/19 year olds

Religious Education Annual Report 2022

In September of 2021, we sent a postcard to all our children and teens with an affirmation based on the 8 Principles of Unitarian Universalism. It read as follows:

I am important.

I am kind.

I am learning.

I am seeking.

I am fair.

I am peaceful.

I am kind to the Earth.

I am a friend to all.

I am LOVED by First Parish in Concord.

I am grateful for another year of growth and discovery! Dawn Van Patten, our Assistant Director of RE, is a delightful co-worker whose creativity, kindness, and flexibility helped make our ministry with children, teens, and families both fun and meaningful.

We were able to meet in person again holding a Family Service followed by Religious Exploration on Sunday mornings. Due to the ongoing pandemic and risk for our youngest children who are still unvaccinated, our programs were held outdoors as much as possible. During the colder months, the Parish Hall and Parlor allowed for good ventilation with air purifiers. We offered online programs in January 2022 during the Omicron spike.

Lora Venesy continued to lead our comprehensive sexuality program called SEAGUULL: Sexuality Education Awareness & Growth through UU Lifelong Learning. Lora led Sunday sessions for 5th and 6th graders in November and December with Sarah Chapman and Jeff Brainerd. We tried a new model for our 8th graders by offering two intensive weekends. We are fortunate to have such dedicated educators.

Our Jr. Youth Group brings together our 6th to 8th graders about twice a month with wonderful co-leadership by Lora Venesy and Dawn Van Patten.

Our Coming of Age program co-led by Kristin Moore and Dawn Van Patten met in person. Seven 9th graders completed the Coming of Age program this year. Thank you to Kristin Moore for her insightful and kind leadership! Eric Moore and I stepped into the roles of additional mentors this year when COVID made it difficult to recruit mentors.

Our High School Youth Group met in person outdoors and returned to their space in the Wright Tavern. Special thanks to Lead Youth Advisor Madzie Burnham, and our Youth Advisors: Eric Moore, Kathy Tyrer, Molly Copland, and Lindsay Howe.

We are in a time of transition. I will miss Rev. Howard Dana and wish him well! Thank you to all the parents, caregivers, and First Parish members who helped support our young people. First Parish is enriched by being a community of all ages. I look forward to deepening our connections with one another, our community, and our world in the new year.

With Loving Care,
Amy

Rev. Amy Freedman
Minister of Religious Education

Facilities Manager Annual Report

Administrative and Workflow Process

- I am continually photographing the buildings and grounds, specifically for recording projects before, during, and after, and generally to capture changes and create an addition to the historical visual record.
- I have developed a spreadsheet, "Facilities Manager Master List" which has over 20 tabs that capture in a central working repository, all the information necessary for the efficient running of the facilities. I have made this available to Assistant Sexton Matt Reilly and Director of Operations Fifi Ball and Trustee Roselyn Romberg
- I have developed an Assignment Tracker spreadsheet that captures, guides workers, and tracks projects/tasks.
- I am continuing to digitize pertinent information for an institutional knowledge repository that can be quickly accessed by Facilities Manager and/or others and used for proactive planning.

Meetings

- Weekly meetings:
 - Operations Director/Facilities Manager: Weekly meetings with Fifi Ball
 - Wright Tavern and residences: Weekly meetings with Roselyn Romberg (TPD)
 - Staff Meeting
- Monthly Meetings:
 - Greening the First Parish Campus Task Force
 - Occasional First Tuesday and Environmental Team meetings.

Event planning

- The amount of events increased over the year, especially after the church reopened for services.
- I have provided, organization, setup, reception coordination and various forms of assistance to internal and external groups.

Staff

- With the retirement of Guy Ministeri, Bob Hoff, and Victor Curran I am the last man standing from the Doug Baker era.
- I have added Matt Reilly, a semi-regular sexton who also brings great people, carpentry, painting, and repair skills.
- So far this staffing arrangement and the assistance of parishioners is tenable.

Contractors/vendors:

I have consolidated services, renegotiated contracts/prices and replaced contractors. With better ones.

- Snowplowing: kept vendor, Landscape Visions
- Shoveling and snow blowing: switched vendor to Landscape Visions
- Fall and spring cleanup: repriced and selected with Landscape Visions to save money
- Lawn mowing and landscape supplies and projects. Changed vendor to Landscape Visions
- Irrigation: kept vendor, Corbett Irrigation
- Lawn care: kept vendor— Simply Safer Lawns.organic products are applied twice yearly with annual aeration.
- John Sullivan, long time plumber for First Parish and the Trustees, continues extremely helpful in educating me about systems and back stories of installations, etc.
- Replaced Todd Whitney with Joe Gibbons Electric.
- I engaged Matt Reilly to help as assistant sexton, carpenter, painter and repairman. He has done a fantastic job and works well with tenants, parishioners and staff.

Tools

- Purchased and employed with great effect and reduced noise:
 - 56 volt Ego blower for cleaning hardscape and landscape
 - 56 volt Ego chainsaw for limbing, pruning and removing fallen trees/branches
 - Electric vacuum: reduced strain on users backs and quick usage without tugging and plugging two long cords.

Projects

Steeple Project CPC Grant

The renovations to the clock hands, and weathervane on the steeple and the painting and repair of the steeple woodwork were completed in September 2021.

Meeting House Roof

In May 2021, the main Meeting House roof was replaced after over 40 years using architectural heavy duty GAF shingles.

Insulated Sanctuary ceiling and walls (cellulose. 9” walls. 20” attic.

Projects planned for 2022-2023

- Meeting House Painting:
 - I created and issued four RFPs for the preparation and repainting of the meetinghouse.
 - Planned for Summer 2022.
- Painting exterior of #1,7,23 houses.
- Replace #23 wood walkway with Wolf decking to provide traction and longevity.
- Repave the asphalt walkway forefront driveway to Chapel to. Eliminate grading issues that'd to a tenant falling on ice puddle.
- Install bluestone steppers on left side of front steps to the labyrinth.
- Install large natural stone steppers stairway on center axis of herb garden to replace old, small and unsafe existing steps.
- Build fence on stairs from tent area to Chapel level. Overgrown shrubs had provided a barrier for MNS children and a temporary wire fence had been installed when the shrubs were removed for the Baker Garden plantings.
- #23 new bathroom floor and plumbing fittings.
- #25 custom build a wood screen door. Paint it black.
- Parish Hall and Parlor insulation for walls and roofs
- ADA. Automatic door for all-gender bathroom. RFP is issued.
- Val Holt Garden
- Parish Hall and Parlor insulation for walls and roofs. RFP is issued. Funding not yet available. Greening the Campus Task Force will be seeking funding.

Greening the First Parish Campus Task Force

- In keeping with best, safest practices, we chose Safe Paws ice and snow melt, replacing calcium chloride.
- Composting of all coffee grounds together with green matter and some leaves has been ongoing and I am building a wattle fence structure to aerate, water and contain the compost which will then be used throughout the campus in various flower/plant beds.
- I have assisted the Greening the First Parish Campus Task Force in securing quotes for various insulation and other weatherizing projects.
- I am obtaining quotes on the Parish Hall and Parlor insulation for walls and roofs.
- Assisted with two prototype plexiglass window inserts in Sanctuary.
- Assisted with preparation for blower door test and infrared imagery.
- We have begun to weatherize areas of heat leakage illuminated by the blower door test and infrared scans. One of the requests is to specify, research, purchase and install a set of bi-fold fireplace doors for the Parlor fireplace.
- We have continued the relamping of the first parish buildings with led fixtures and lamps.

Women's Parish Association (WPA)

- I coordinated with WPA to replace 19 older 6' and two 3'x3' tables with modern, more durable tables that are lighter, easier clean and set up/breakdown.
- After winterizing the Herb Garden, I am working with WPA to plant and tend the garden in 2022. Horticulturist Dee Smithers resigned and I hired Taking Root, Kate Pullano to maintain the Johnson Garden, Baker Garden and the Deborah Greeley Herb Garden.

Coffee Hour

- Coffee hours resumed with the reopening of the church for services. With the two new fire tables we were able to continue without interruption through snow, rain, heat and the gloom of Covid-19 protocols.

Building Maintenance

- Created signage with magnetic whiteboards for opening and closing procedures.
- Created signage with laminated illustrated signs for : WPA, Welcome Table, Pastoral Milestones, Share the Plate, Environmental Team, Crop Walk, Artisans Fair, Mothers Day Walk, etc.
- Exterminator has been contracted for pest control (mice, carpenter ants, etc.) for the four residences (#s 1, 7, 23, and 25 Church Green) and main church building.
- Carpets were cleaned.
- Windows were cleaned.
- Many interior and exterior walls and trim were repainted
- I repainted the balcony floors with oil-based paint.
- Side door roof
- A leak in the roof outside the corner of the parlor, most likely caused by ice dams, stained the ceiling, wall, and Dana Greeley portrait. The portrait was subsequently sent out to a professional art conservator for cleaning.
- The roof in this side door area was replaced with ice/water shield and copper gutters and roofing.
- Extensive weatherizing of Meeting House and houses started.
- Weeded beds and pruned gardens.
- Mulched beds.
- Added loam and reseeded areas around campus.

Milldam Nursery School (MNS)

- Met with Kate Damon and staff at MNS to assess and address their needs
- Replaced a large section of blackened floor with vinyl planking.
- MNS and First Parish again rented a 20'x20' tent. This has allowed us to offer outdoor distanced meetings with cover from the elements.

Four Houses, 10-6 Concord Greene and Wright Tavern (managed by the Trustees of Parish Donations)

#1 Church Green/Coan House

- ▪ New hot water heater installed
- ▪ New tenant on second floor moved in December 2021. We have worked with her schedule to make improvements and repairs.
- ▪ Painted floors, walls and ceilings
- ▪ Supervised installation of spray foam insulation in roof (r-30)
- ▪ Supervised installation of cellulose insulation in walls (r-13)

#7 Church Green/White Cottage

- ▪ Plumbing repair in process (bathroom)
- ▪ New hot water heater installed
- ▪ Supervised installation of cellulose insulation in walls (r-13)
- ▪ Supervised installation of spray foam insulation in roof (r-30)

#23 Church Green/Thayer House

- ▪ Supervised installation of cellulose insulation in walls (r-13)
- ▪ Will supervise installation of spray foam insulation in roof (r-30)

#25 Church Green/Ball House

- ▪ New stackable washer dryer installed

Wright Tavern

- ▪ I have continued to serve the Trustees and tenants of Wright Tavern by identifying, arranging visits for contractors, and procuring proposals. Feltonville Building Company was engaged to do exploratory and access carpentry work for the structural engineer.
- ▪ Electrical, Lighting, plumbing repairs performed. Cleaned out basement. Donated furniture to worthy parties.

Events

Provided scheduling on calendar and sexton duties for memorial services, parties, coffee hours, concerts, chartered and guest group functions.

Asset Management

The two Elizabeth Wentworth Roberts paintings hanging in the Parish Hall are scheduled to be loaned to the Concord Museum and the Concord Art Association. I arranged for the paintings to be cleaned and reproductions made which will be rehung in the Parish Hall in the gold frames. The Concord Museum will reframe the originals.

First Parish Natural Resources

- Pruning
 - I dedicated 70 Facilities Manager hours to pruning the many shrubs and treason the campus. I saved fossil fuel using the pruning to build a natural enclosure seating area in the woods beyond the Deborah Greeley Herb Garden
- Woods
 - Transplanted hosts and grasses to woods. Line and along new walk in the woods.
 - Created a path through the woods.
 - Created an out door seating area (wattle fence construction with benches.
 - Created a wattle fence compost bin.
- Herb Garden
 - Weeded, thinned and added herbs.
- Johnson Garden
 - Installed a new irrigation drip loop.
 - Pruned extensively to get the garden back in its intended form.
 - Weeded and mulched.
- Baker Garden
 - Designed and planted a new garden in honor of Doug Baker. Had a commemoration ceremony.
 - Shrubs, perennials and bulbs added and tended.
 - Weeded and mulched.
- Edibles Garden Box Planters
 - Oversaw construction and installation of two 4'x4'.edibles box planters.
- Val Holt Garden (approved by Historic Commission May 2022)
 - Designed and will build a garden around the Kopjafa pole.
 - Will build a 5' diameter thin stone mortared wall for impatiens planting.
 - Will install shade plants and river rock.
 - Dana Booth refinished the Kopjafa pole in April 2022.
- Environmental Team Collaboration.
 - Made fact sheets and poster for Earth Day
 - Arranged for Sunday coffee hour table presence.
 - Presented a comprehensive plan for natural resources at First Parish to the ET meeting in May 2022.
- Education and Outreach
 - Created and published an RE program with Eagle Scout candidate Leah Greenburg. Together with Amy Freedman, Dawn Van Patten, RE sttudents, and Dian Pekin representing the Environmental Team, we led a planting session at the boxes Leah had built as her Eagle Scout Project. Also I developed a scavenger

hunt activity for the children and adults, encouraging them to find various forms of interconnected life; pollinators, aquatics, edibles, seed bearer=ing shrubs and trees, etc.

- I plan to extend the appreciation and usage of the grounds with like-minded private organizations, groups and individuals. Green groups, horticulturalists, etc.
- Inspections
- All inspections were planned and performed in a timely manner

SAC Program Reports

Amnesty International, Group 15

Contact: Nancy Lyons, njlyons22@gmail.com, 978-505-1936

First Parish members: Phil Villers, Ruthann Brien-Minkin, Nancy Lyons

Officers: Coordinator, Kathleen Bean; Secretary, Ruthann Brien; Treasurer, Carol Kyte

Membership: 16 members

This year:

Immigration and asylum issues have continued to be a focus for Group 15, with a member of our group attending the F.P. Concord Immigration Justice Task Force meetings. Group 15 has advocated for immigration-related bills in the Massachusetts legislature, including The Safe Communities Act and the Work and Family Mobility Act, as well as for the safe release of people in detention, jails and prisons. We work on individual cases of injustice in the U.S., for example, sending letters to President Biden urging him to grant clemency to Native American activist Leonard Peltier. Locally, we support the work of Dignity in Asylum, which has been vetted by Amnesty/USA to qualify for “community sponsorship” from other Amnesty groups.

Regular monthly meeting activities (currently on Zoom):

—Urgent Action Letters: Currently we send a letter internationally, advocating for human rights activists who have been imprisoned or face other punishment for peaceful protests. We discuss the background and features of the specific case.

—Individual at Risk program: We have decided to move on from our advocacy for Maria Ressa, who faced lawsuits for articles critical of Philippine President Duterte. We noted her high visibility and international support, as well as her freedom to travel to Norway in December to accept her Nobel peace prize. We are now taking on the case of Bozorghmer Yorov from Tajikistan, a human rights lawyer and member of the opposition Social Democratic Party of Tajikistan. He was sentenced to 23 years for representing members of the banned Islamic Revival Party (IRPT).

—Abolition of the Death Penalty in the US. This year our focus has covered the abolition of the Federal death penalty and individual death penalty cases. Most recently we advocated for Melissa Lucio, whose conviction for murder was based on an unreliable, coerced “confession” and unscientific false evidence that misled the jury. The Texas Court of Criminal Appeals stayed her execution, providing the opportunity for review of her case.

—Criminal Justice and Solitary Confinement Reform: We continue to educate ourselves on and advocate for efforts to reform the criminal justice system in Massachusetts. In particular we wrote letters to legislators in support of two bills: protections for prisoners in segregated confinement (solitary confinement) and protections for prisoners on mental health watch.

—Massachusetts legislation related to immigration: We continued our advocacy for the Mobility and Safe Communities bills. The Work and Family Mobility Act has passed the House and Senate; the legislature is expected to pass a final version with a veto-proof majority. The Safe Communities Act is still in joint committee, whose report is due out in June.

—Guest Speaker: in our November meeting we had a visit from State Senator Jamie Eldridge to discuss and answer questions about some of his pending criminal justice reform bills and immigration bills.

Looking ahead:

Group 15 will continue regular monthly activities, including a focus on immigration, our new Individual at Risk case and, when Covid restrictions allow, outreach activities within Concord and surrounding communities. We expect to continue joining with other human rights related groups and organizations, including First Parish Concord Immigration Justice Task Force and DIAS.

Diversity Committee

Chair: Sara Ballard, sara@sb.org, 978-314-0763 (cell)

The Diversity Committee currently has seven members and associate members.

This year we have continued to work on rechartering our status as a Welcoming Congregation with the UUA.

We presented a showing of the documentary film “Disclosure”, which examines transgender depictions in film and television, revealing how Hollywood simultaneously manufactures and reinforces stereotypes and attitudes about those who are transgender. This was followed the next evening by a discussion of the movie via Zoom. We also provided a link to watch the film on Netflix.

We sponsored this June’s share-the-plate for OUT Metrowest, an organization that provides support and services for LGBTQ youth in the Boston Metrowest area.

We have purchased two garden-sized Progress Rainbow flags and metal holders to place on the west side circle and the east side of the church. The Progress Rainbow flag includes a white, pink, blue, brown, and black chevron on one side; these colors indicate support for those who are transgender and BIPOC (black, indigenous, and people of color).

Respectfully submitted,
Sara Ballard (Chair)

Environmental Team

There are 33 people on the Environmental Team. In addition, there are contact lists with 80 people. Gail Kharidia has been chair since May 2, 2021.

For the 2021-2022 fiscal year, the Environmental Team has the following to report:

- New priorities were adopted at the beginning of the fiscal year. Environmental upgrades to the church complex had become an increasing focus of the Team over the prior two years. The Greening of the Campus Task Force was formed, taking over the upgrade interests and actions.
- Two new program priorities were developed: a Program on Nature- Based Climate Solutions and a Personal Climate Actions Program.
- The Program on Nature Based Climate Solutions included (a) a film viewing of Kiss the Ground - a film about natural agricultural practices and soil rejuvenation. (b) a film discussion, and (c) a panel presentation. The panel presentation was given by Peter Lowitt, Administrator at Devens, and Sharon McGregor, an environmentalist, and former Assistant Secretary of Environmental Affairs of Massachusetts. The presentation addressed natural landscaping and soil rejuvenation at Devens and a one-acre personal property in Concord. Slides were included in the presentation. About 50 people attended the online program.
- The Personal Climate Actions Program was a weekly list of actions individuals could take. The weekly list was shared in FP Weekly and sent to the Environmental Team and interested contacts. The types of actions included (a) personal actions on such topics as reducing auto emissions, recycling, and composting;(b) advocacy meetings for taking legislative actions, (c) events and meetings and (d) suggested online newsletters. The Program ran for 30 consecutive weeks at which time it was reduced to one or two weeks per month. .
- In December 2021, the Environmental Team identified 6 new Priority Projects for the 2022 Calendar Year. These included an Earth Day /Month Program, a Sustainable Landscaping Program (a continuation of the Nature-Based Climate Solutions Program), a Climate Media Program for the Congregation, a Project Drawdown Program, an Environmental, Social Investment and Governance (ESG) Program, and a Heat Pump Program. Information on these programs is below.
- The Earth Day/Month Program included a film, Youth v Gov, sponsored by Interfaith Power and Light, and a Climate Blessing cited nationwide at noon local time on Earth Day (April 22). The program concluded at the end of April.
- The Sustainable Landscaping Program is on-going - clearly identifying the principles and practices of sustainable landscaping and providing useful guidelines for finding and hiring a sustainable landscaper. The group participated in the Cooler Climate Festival in Concord sponsored by the Concord Comprehensive Sustainable Energy Committee and other organizations. It had a table with printouts on Sustainable vs Conventional Landscaping and Sustainable Landscaping at First Parish Church.

- The Climate Media Program developed an 8-month program of selected books, videos, podcasts, and articles for the congregation. Like a book club, each month there is a selected media followed by a discussion at the end of the month. The program is on-going.
- The three remaining priority projects are in the process of being developed. These are Project Drawdown, ESG Investing and a Heat Pump project.
- Two informative/ educational presentations were made to the Environmental Team: One on Landscaping and Environmental upgrades at the Church complex by Bruce Davidson, Facilities Manager and one on Waste Management by Melissa Simoncini, Environmental Services Program Administrator for Concord.
- A change in the decision-making process at Environmental Team meetings was initiated. This involved moving from an “up/down vote” decision making process to a “consensus building” one. Paul Langston-Daley, our new Social Action Director, contributed to the development of this new process, suggesting the “Fist of Five” decision process with which he is familiar.

Fiscal year 2021-2022 was a busy and productive year. It is anticipated that fiscal year 2022-2023 will be a continuation of this progress.

For more information on the Environmental Team, please contact Gail Kharidia at gail.kharidia@gmail.com

Immigration Justice Task Force

The mission of the First Parish Immigration Justice Task Force (IJTF) is to support vulnerable migrants and to take action in response to immigration injustices in our country, and to educate ourselves and our fellow parishioners about this continuing crisis.

The IJTF is a First Parish Concord Social Action program launched in February 2017. Our regular meetings are the first Monday of each month; sometimes sub-committees meet at other times. Sessions during this church year have been a mixture of Zoom and hybrid meetings. The pandemic has not seemed to have affected our group’s cohesion. Attendance continues to average 9-12 of our membership of over 20. Members are also involved in immigration justice related activities on their own, including many types of volunteering and activism. While we are invested in immigration policy impact and reform nation-wide, we focus primarily on the greater Boston area.

Primary contacts for the IJTF are Tony Rodriguez (trod.rodriguez@gmail.com), Regina Corrao (reginacorraoconsulting@gmail.com), and Laurie Van Loon (lvvanloon11@gmail.com), Regina Corrao is also our primary publicist. Others have taken on a variety of leadership and ancillary roles.

Task Force Structures, Initiatives, And Activism That Continued from Last Year:

Internal communication: A Google group, Facebook page, and frequent emails help keep our members connected with each other and informed.

Communication to the FP congregation: To engage the congregation we have leveraged First Parish's methods of communication, especially important in the continuing pandemic: notices of upcoming events in First Parish Weekly, and notices on the First Parish Facebook page as well as the Social Action area of the website. Our work continued despite the resignation of Social Action Manager Adrienne Betancourt just after the start of the church year. As immigration justice issues emerge, we attempt to make it easy for the congregation to know of and participate in IJTF's efforts and related activities. Our Quick Response Team continued under guidance of Jane Blumberg and Regina Corrao; signees were offered information about activism options that could be exercised easily.

Internal task force sharing: In addition to activities backed by the whole task force, over the years the IJTF has evolved into a clearinghouse for sharing individual interests and efforts related to immigration justice. By email and during meeting time, individuals and subgroups bring to the task force information about immigration-justice related events, policies, and opportunities for education, outreach, volunteering, and activism, at local, regional, national, and international levels.

Internal task force development: The IJTF held a half day July 2021 retreat facilitated by Regina Corrao to look back on the previous year, refine our goals and actions going forward, track initiatives and progress, and confirm which members have volunteered for specific actions or areas of attention. We have found this organizing structure helpful in managing such a multi-faceted mission. After reviewing the status of our existing goals, we will be refining our future focus over the summer and early fall.

Sanctuary Follow Up: The task force continues to provide support to the family of Maria, formerly the First Parish Bedford Sanctuary guest, via contacts with her, led by Abby Buhle, and aid to her deported son living and studying in Guatemala.

Lobbying and activism: The task force has sent numerous messages and phone calls and signed multiple petitions related to efforts such as the Safe Communities Act, the Mobility Bill, injurious aspects of detention, and negative policies of Homeland Security, CBE, and ICE. Kathleen Bean has been our liaison to Amnesty International. Border concerns continue, and we submitted requests for next year's Share the Plate to feature two organizations related to safety and justice for those waiting at the border with Mexico.

New Initiatives and Actions In 2021-22:

Share the Plate: The task force sponsored the May 2022 STP organization, La Colaborativa, formerly the Chelsea Collaborative. La Colaborativa helps with food, housing, jobs, English, vaccinations, citizenship, and legal aid. They are a lifeline in Chelsea and the communities they serve.

Afghan Family support: In September 2021, our attention shifted to the urgency of Afghan refugees' plight and the possibility of providing support. Given multiple unknowns, such as how arrival is handled by agencies, how to collaborate with other volunteer groups, and how to act when needs were not yet known, planning was required to be fluid and flexible. A special google group was established to track incoming information and role decisions within the Task Force. By the end of October 2021, an effort to recruit and orient volunteers was underway, as well as outreach to other faith communities in Concord.

The resulting Concord Interfaith Afghan Family Support Team has met on Zoom every two weeks to share resources, stories, and ideas, and includes caring people from Holy Family, the B'Hai Community in Concord, Kerem Shalom, Tricon, and Trinity. A sub-group within the task force moved into action (along with other volunteers within and outside First Parish) when the H family arrived in Lowell Thanksgiving week. The team partnered with the International Institute of New England (IINE), an established refugee resettlement organization in Lowell, to prepare for the family's arrival. Two sisters, R & T, arrived the same week in Concord, with housing provided by the Cataldo family. Weekly meetings have been held with IINE, and bi-weekly meetings with Catholic Charities.

Extensive fund-raising among the volunteers and outreach to their communities helped establish necessary material support for the families beyond the minimum provided by the refugee agencies.

Jane Blumberg is volunteer coordinator for our Afghan family support work in Lowell. Regina Corrao has led the Concord sisters' Afghan family support, with a team of volunteers from Kerem Shalom. Throughout the church year over 40 volunteers have provided orientation and direct service with the ultimate goal of helping establish independence in the US for this rural family of 12 in Lowell, and for the two sisters in Concord, who recently moved to Waltham. Involvement has included logistical, educational, medical, economic, and practical help, often daily, and a great deal of organization and clear, structured communication have been necessary to assist and coordinate volunteers.

Many members of the task force have provided key roles, (as have others within and outside First Parish). We especially want to lift up Tony Rodriguez for his constant multi-tasking, leadership by Tony Rodriguez, Jane Blumberg, and Regina Corrao, and frequent process reports from Jane Blumberg. Medical guidance has been regularly provided by Rachel Wheeler and Joyce Pulcini. Ted Bayne gave extensive logistical help, and Janet Donovan provided weekly support, transportation, and problem-solving.

As a sign of appreciation for so much loving and dedicated work with the two Afghan sisters, the Concord Interfaith Afghan Families Support Team was recently presented a beautiful engraved-glass recognition by Catholic Charities: The John and Virginia Kaneb Award for Justice and Compassion. This will be displayed by each of the faith groups involved in this effort.

As the church year is ending, those involved are reflecting on what has worked well, and how to ensure that the focus remains on preparing these families to manage their lives on their own, while still providing necessary bridges to do so. Preliminary conversations have begun, to consider whether the lessons learned from helping these two families could be documented and shared with other teams of volunteers wanting to support new migrant families.

New SA manager in March: In March members of IJTF met individually and as a group with incoming Social Action manager Paul Langston-Daley. We look forward to a strong working relationship in the new church year.

Respectfully submitted,
For The Immigration Justice Task Force,
Laurie Van Loon

Partner Congregation Committee

2021-2022 PCC Members

Lillian Anderson, Tim Whitney (Co-Chairs), Beth Norton, Dawn Van Patten (Staff Liaisons), Darien Smith (Treasurer), Sara Ballard (Communications), Tim Whitney (Recording Secretary) Kathy Spang, Dana Booth, Barbara Olson (Co-chairs, Student Scholarship Sub-committee), Kathy Booth, Ellen Crompton, Marilyn and Peter Lowitt, Pat Brinkman, Peggy Claybrook, Bill Taylor and Rodger Mattlage (Chair Emeritus).

Summary of Committee Activities and Other Items of Note

- Committee meetings: Met monthly through the year for in-person dinner meetings.
- Keresztúr Zoom call: July, 2021 call was held with Keresztúr (15+/- attendees).
- Facebook Messenger: group chat was created between Partnerships.
- Transylvania Thanksgiving: FP service held late September 2021.

- Iván Kristoffy Memorial Plaque: Installed in Berde Mózes High School fall 2021 (*see below*).
- Scholarships: All requested Keresztúr High School scholarships were funded in fall, 2021 (*see below*).
- Christmas PCC group holiday card: Created and sent to Keresztúr.
- Christmas Eve collections: First Parish's 2021 Christmas Eve collections of \$4159 (one half of the total collection) was wired to Keresztúr in February.
- Democracy Discussion: Reading Twilight of Democracy and discussion with Reclaim our Democracy group
- Keresztúr Zoom call: March, 2022 call was held with Keresztúr (15 +/- attendees).
- UUPCC and ICUU: Organizations have been dissolved as of fall, 2021. A new entity has yet to be created to replace them.
- Graduation notes and gifts: Sent by Kathy to all graduates for spring, 2022.
- Graduation: Kathy Spang wrote a speech for graduation, spring 2022, which will be read there.
- Kopjafa refinishing: Completed by Dana Booth and Bruce Davidson in April, 2022.
- Val Holt Memorial: Landscaping around Kopjafa has been approved by the Concord Historic Districts Commission and will be completed by June 2022.
- Partnership Anniversary: 30th anniversary of the Partnership is in 2023 – hoping for trip there in September, 2023 (*see below*).
- UUPCC membership: Since this entity is dissolved we will hold on financial support until the requested amount is identified.

Concord - Székelykeresztúr Scholarship Program

The Scholarship program between folks at First Parish and the Unitarian High School in Székelykeresztúr, Transylvania, Romania has been going strong since 1996. The PCC's Scholarship Subcommittee is co-chaired by Kathy Spang, Dana Booth and Barbara Olson.

- Scholarships Awarded: For the 2021 - 2022 academic year, fifty-six students (thirty-nine at Berde Mózes Unitarian High School and seventeen in colleges and universities) are supported with a total of \$25,800 in scholarships donated by sixty-eight donors (families/individuals, the Choir, and the Women's Parish Association, and members of the Massachusetts Hungarian community). The standard annual scholarship amount remained at \$400 per high school student and \$600 per college-level student. This money has been wired to Keresztúr through the UUA.
- Ivan Kristoffy Plaque: An additional donation of \$2000 was sent from the Kristoffy memorial fund to the school for the costs involved in the Plaque in memory of Iván Kristoffy, a FP member who was responsible for starting the scholarship program. Extra funds from that money will be used as the school determines.
- Graduation Gifts and Cards: Eight Senior graduating scholarship students have been sent a \$50 gift each and a congratulations card from their sponsors, to be given to them at their graduation ceremony at the end of May. Kathy Spang will be sending a congratulatory speech from our congregation to be delivered at the graduation.

Future Trip Planning

Concord and Keresztúr have continued conversations and planning for travel:

- Importance of multi-generational participation; introducing new Concord families to the experience;
- More shared experiences and interactions with Keresztúris when there;
- Using arts and other activities as shared experiences: dance, music, cooking, crafts, etc.

Pending Covid, our goal is to send a large group (25 people +/-) to Keresztúr in September, 2023 to celebrate our 30th anniversary of the Partnership and join their Thanksgiving holiday. Trip planning is to start in the fall of 2022.

We also have encouraged self-funded smaller groups to consider trips there before that date.

Respectfully submitted,

Lillian Anderson and Tim Whitney, Co-Chairs (lillianand@comcast.net,
timothywhitney@gmail.com)

Partner Congregation Committee

Racial Justice Action Group

Leadership Team: Sally Lewis sallewis3@gmail.com and Sue StCroix sue@suestcroix.com with emeritus leaders Leslie Fisher leslisherfisher@treitman.com and Cindy Soule cindysoule@gmail.com

Annual Report submitted by Sally Lewis and Sue StCroix, May 20, 2022

Participation

Number of people on RJAG Google Group mailing list: 63

Number of people attending some of most monthly meetings: 8-12

Retreat

On September 17th and 18th we held a RJAG retreat with 35-40 attendees. Regina Corrao Clannon and CC King facilitated a discussions on what matters, what has worked or not worked in the past and what matters going forward. RJAG has updated Goals in Education, Collaboration beyond First Parish, Legislative, and Collaboration within First Parish.

8th Principle

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 accountably dismantle racism and other oppressions in ourselves and our institutions.”

Late Fall, RJAG began researching the 8th Principle and it’s fit at First Parish. The RJAG team voted unanimously to bring the 8th Principle adoption vote to the annual meeting. To bring awareness to the church community, we’ve presented the 8th principle to various committees and groups, led the April 24th service on the 8th Principle and included stories, videos, history in FP weekly. The vote is scheduled for the annual meeting.

Jubilee Three Anti-Racism Training

RJAG members and FP staff attended Jubilee training. This is an intensive three-day course on Anti-Racism, co-led by Paula Cole Jones, one of the authors of the 8th principle.

Racial Justice Action Group Discussions

Our meetings have been open to the First Parish Community and have included several deep discussions to better understand the impact of racism in ourselves, our church, local community and beyond. Topics included: Wilderness Journey documentary; thoughts on sermons from Mary Margaret Earl’s, Head, Hands and Heart and Howard Dana’s One Year Later; A Reckoning documentary on structural racism in

Boston; Concord community response to Nikole Hannah-Jones disinvitation; and Adoption of the 8th Principle.

UU Urban Ministry

FP Liaisons, Leslie Fisher, Gib Metcalf, and Rebecca Winborn have kept First Parish and RJAG up to date on the work being done at UUUM. They have helped the First Parish community learn more about the Roxbury Meeting House renovations needed to support the local community with a cocktail zoom event. Leslie, Gib, and Rebecca led the effort toward more proximity with the Urban Ministry with food drives and visits during the Mother’s Day March. FP weekly includes UUUM sponsored art exhibits and musical performances available both in person and zoom.

Mother’s Day Peace March in support of Louis D Brown Institute

On Mother’s Day, First Parish members joined the march in support of Louis D Brown Peace Institute. We exceeded our fundraising goal of \$3,000. RJAG will coordinate First Parish participation in the March moving forward. Sincere thanks to Margie King Saphier for bringing the Peace March to our community and leading this effort. Thanks to Amy Freedman coordination and arranging for the bus transportation.

UU Mass Action

RJAG members continue to participate in UU Mass activities with other local UU congregations, Black Lives Matter meetings, and legislative advocacy events.

Share the Plate – RJAG Sponsored

The January Share the Plate recipient was the Boston UJIMA Project, a place-based investment fund, controlled by community members in the Boston area to support businesses, real estate and infrastructure projects that would otherwise struggle to find financing. Updates on UJIMA work and events are shared via FP weekly and UU Mass Action newsletters. Share the Plate contribution was \$1,610.50 .

Boston Black History Tour

In June, First Parishioners will tour Boston Black History with the National Park Service.

Collaborating on Anti-Racism in Concord

In April, RJAG sent a letter to the superintendent supporting the requests from parents of students of color in the Concord Schools, helping ensure they would be addressed. RJAG is committed to be an ally with COAR, Communities Organizing Against Racism, Concord Carlisle Boston, and works to ensure their voices are heard and supported. RJAG members will continue to be at school meetings and provide other support in this work.

Last fall Middlesex School disinvited Nikole Hannah-Jones, 1619, as their keynote speaker for Black History Month. A broad spectrum of people and groups in Concord gathered initially to re-invite Nikole Hanna Jones to speak in our community. Group representatives include schools, Concord DEI office, churches (including FP Standing Committee and RJAG), non-profits, and students. Concord DEI office has moved into the leadership role, with other people willing to become the hands and feet on the ground. Focus has shifted from the specific action to invite Nikole Hanna Jones to is reassessing what does it means for the town to look at racism/local history/US history/1619. Ideas being considered included community reads (1619 or Black Walden), town wide Juneteenth Celebration, all intended to engage people in the community in the work to become anti-racist.

Reclaim Our Democracy

Our group was formed in 2014 when the Denominational Affairs Committee at First Parish embraced the UUA Congregational Study Action Issue of Escalating Inequality. We sponsored activities in 2014 and 2015 that led to the formation of the Americans for Economic Fairness group in May of 2015. We learned that the issues surrounding escalating inequality are complex, intertwined, systemic and deeply rooted in our culture. The most compelling issue that the group identified was the impact of escalating inequality on our democracy.

In June of 2016 the UUA adopted a new Congregational Study Action Issue The Corruption of Our Democracy which was focused on the negative influence that huge amounts of money from

corporations, billionaires, and special interest groups has on our national elections and on the effectiveness of congress. This issue fit in well with our previous work and we began focusing on it in September of 2016. We adopted a new name and created a new mission statement.

Reclaim Our Democracy is an inclusive, collaborative, multi-partisan movement. Our goal is to reclaim our democratic rights as citizens of the United States of America to have a government that truly represents and supports the needs and desires of all people.

We currently have 19 people on our planning team and about 400 people on our mailing list. Fred Van Deusen is the current leader of the group. With the exception of one in-person meeting in October and a hybrid event in May, we continued to meet via Zoom throughout the year.

The fight for democracy is entering a critical stage as voter suppression and authoritarianism are taking hold in many states and in Congress. We organized a number of virtual democracy events and actions during the year to help educate our members and others on what is happening, and what we can do.

- In September we supported the Unitarian Universalists for Social Justice Write Here! Write Now! campaign that focused on voting rights, the Freedom to Vote Act and the John Lewis Voting Rights Advancement Act.
- In October we co-sponsored an event with UU Marblehead titled Freedom and Democracy or Oligarchy. The featured speaker was Jasmine Banks, Executive Director of Unkoch My Campus. The panel discussion included UUSJ Executive Director Pablo DeJesus, Diane Proctor from LWV and Reclaim Our Democracy, Ulysses Lateiner, volunteer organizer with We the People Massachusetts, and Erin Leahy, Organizing Director for Act on Mass.
- In January we invited members of the FP Partner Congregation Committee to join us in a book read and discussion of the *Twilight of Democracy: The Seductive Lure of Authoritarianism*, by Anne Applebaum. We learned a lot about authoritarianism and the impact it is having on democracies around the world, including the U.S.
- In February we invited Adam Eichen, Executive Director of Equal Citizens to speak on the topic of *The Democracy Movement: Where it Stands Today and Where it Needs to Go*. Adam and *Daring Democracy* co-author Frances Moore Lappe spoke at an event we sponsored in December, 2017.
- In March and April Social Action Manager Rev. Paul Langston-Daley led us in organizing a two event forum titled *Democracy as a Spiritual Practice*.
 - Strengthening Our Civic Muscles featured Rev. Patrick McLaughlin from the UU Church of Manchester, NH. He explored authoritarian regimes through the lens of Timothy Snyder's book *On Tyranny*.
 - After the Protests featured author Sharon Welch. She explored the ways we can rebuild our civic society to bring our democracy back into balance.
- Finally, in May we hosted a hybrid event, in-person and via Zoom, featuring Danielle Allen, distinguished author, Harvard professor, and recent candidate for Governor of Massachusetts. She spoke to us about *Partnering for Democracy in Massachusetts and Beyond* and did a wonderful job of highlighting the critical issues facing democracy in the U.S. and what we can do to address them.

Videos of these events are available on our website ReclaimOurDemocracy.org. As we move into fall of 2022 we will be working actively on the First Parish UU the Vote program leading up to the extremely important mid-term elections.

We also did the following:

- Continued to develop and promote our educational website called ReclaimOurDemocracy.org that has attracted approximately 80,000 visitors from around the world, and our Reclaim Our Democracy Facebook Group
- Published a bi-monthly newsletter with information about events we are sponsoring and other events of interest

We are currently working directly with a number of non-profit organizations that are also working to reclaim our democracy including UU Mass Action, UU's for Social Justice, League of Women Voters Concord-Carlisle, American Promise, and Concord Indivisible. For more information, email Fred Van Deusen at fredvandeu@gmail.com. All are welcome to join our mailing list and attend our events.

Committee Reports

Standing Committee Annual Report of the Chair

The Standing Committee has had a fully engaged and productive year.

Working backwards, we end the church year with the promise of a fruitful transition in the year ahead though not in the Standing Committee, whose officers are continuing with no change. Your leadership team looks forward to continuing our work together and providing some consistency in the months to come.

We are spending these last few months saying goodbye to our Senior Minister, Rev Howard Dana, and wishing him well. Howard has brought many gifts to First Parish, including his care and attention to our right relations, fundraising, staff development, and all the myriad of responsibilities that fall on the minister, not to mention his artful sermons and worship services. Howard's love for our historic congregation is so evident, and we are a kinder congregation for his caring. We will miss his spiritual leadership.

We've just – as of today's writing – hired an Interim Minister Reverend Seth Carrier-Ladd to assist us through the next period from Rev Howard Dana's ministry. <https://www.revsethcarrierladd.com> and we look forward to Reverend Seth guidance through the search for a settled minister, and the preparation for that change.

The Standing Committee started this year discussing change in the congregation, building on the goal areas we set the year before. These areas will continue to be our focus areas in the years to come.

- Governance: We looked at our issues of (mis)communication, insufficiently shared leadership, and lack of intentional time devoted to collaboration across program areas and strategy development. We observed that our governance structure (staff and committee model) is typical for a large "Corporate" size church, which may be not serving us well at our current size. We looked at other how other congregations are organized, interviewed the staff, and started discussions with our UUA Regional staff.

- Focus on Community, Belonging and Communication: In the critical area of engagement and connection, we started the year by chartering the Commission on Institutional Change, and worked with the Congregational Life Committee. We sponsored a retreat with our UUA Regional consultant Meek Groot, in February, attended by 75 people, entitled "Leadership in Shifting Times: ^[L]~~[S]~~_[SEP]Transitioning to a New Future", and then continued the congregational conversations in April.

- Sustainability and Long Term Finance: We assisted the Greening the Sanctuary with their contracting, and provided focus and training on connecting with lost pledge units.

Of course, the Standing Committee also takes up any business that comes before the board, of which this year was no exception. This year, we have discussed various arrangement for

safekeeping and display of two paintings that hung in the Parish Hall, painted by Elizabeth Wentworth Roberts, an accomplished artist and patron of the arts who lived in Concord. We also heard updates and supported adopting 8th Principle, the Wright Tavern efforts, and our proposed annual budget.

Needless to say, when Rev Howard Dana resigned in March, the Standing Committee pivoted to new focus areas – celebrating Howard’s ministry and searching for the Interim Minister.

We gratefully submit this annual report in service to the congregation,

Sincerely,

Liz Rust, Chair, CC King, Vice Chair, Heather Packard Treasurer, Jennifer Izzo Clerk, Mike Beer, Jim Hawks, Gib Metcalf, Caroline Minkin, Jim Reynolds, Susan See, Virginia Taylor

Commission on Institutional Change (COIC)

In response to the multi-year, self-reflection effort completed by the UUA and resulting in the report title **Widening the Circle of Concern**, the Standing Committee commissioned the First Parish in Concord Commission on Institutional Change (COIC) on November 9, 2021, accountable to the Standing Committee and guided by the following charge:

First Parish in Concord Commission on Institutional Change (FPCOIC) is charged to:

- *Assess congregational policies, practices, and procedures for their alignment with our UU values of equity, inclusion, and diversity.*
- *To engage First Parish members, friends, and staff in identifying opportunities for systemic change that will help FPC realize itself as a place of radical welcome and anti-oppression work.*
- *To recommend action(s) that serve to dismantle white supremacy within the culture, practice, policies, and procedures within FPC.*

Darien Smith and Toby Smith Ropeik were asked to co-chair the Commission with the expectation that:

- They would recruit 3-7 additional members (which could include up to two FPC friends), including those who identify as BIPOC or other marginalized groups within First Parish.
- Most members would have already completed *Beloved Conversations*, *Transforming Hearts*, and other education programs related to diversity, equity, inclusion, and implicit bias.
- The Commission’s work would be slow, thoughtful, deliberate.
- The Commission’s work would roll out over at least two full church fiscal years (through June 2024).

Based on recommendations from FP members who laid the foundational work for this Commission and after an open solicitation to the congregation to identify people interested in sharing the work, the following members were added:

1. Jennipher Burgess
2. Peter Nobile
3. Ken Reeves
4. Cindy Soule
5. Dana Snyder-Grant

The seven-member group may be expanded at some future point.

The Commission's first meeting as a full group took place on February 19, 2022. And the Commission has met every two weeks since. COIC work completed this fiscal year has included:

- Meetings with Rev. Howard Dana, Rev. Amy Freedman, and Rev. Paul Langston-Daley to solicit guidance
- Approved a covenant under which we operate (see next page)
- Set up a Shared Google Drive to hold agendas, minutes, resources
- Set up a Widening the Circle/COIC Web page on the FP website
- Sent periodic updates to the congregation through FP Weekly and on our FP web page
- Familiarized ourselves with the background UUA events which launched this work
- Familiarized ourselves with the UUA report, Widening the Circle of Concerns (WTC)
- Became more familiar with the WTC Study/Action Guide (ongoing)
- Familiarized ourselves with background work done at First Parish, including the Sunday service on June 13, 2021
- Explored DEAI work done by several surrounding towns
- Brainstormed a list of tasks that might be included in our work (ongoing)
- Lit the Social Action Candle, introducing our work at the Sunday service on April 10, 2022
- Learned more about change management and handling difficult conversations and conflict w/ Rev. Ken Reeves
- Heard from RJAG about their work to promote the proposed UU 8th Principle
- Discussed coordinating our work with next year's church interim work; to be discussed w/ the Interim Minister
- Updated the Standing Committee on our progress at its May 10, 2022 meeting

COVENANT

The 8 Guidelines for Equity and Inclusion

1. **“Try on”** is an invitation to be open-minded to others' ideas, feelings, world views and ways of doing things so that greater exploration and understanding are possible. The invitation also includes feeling free to take those things that “fit” and to leave or file away those things that don't fit.
2. **“It's OK to disagree”** assumes that disagreement is not only inevitable but can help individuals and groups produce better outcomes. By acknowledging what we have in common and by recognizing, understanding, and appreciating what is different between us, individuals and groups can shift the pressure to “be,” “think,” or “act” the same into

permission to generate all possible ideas and strategies. This guideline assumes we can disagree and still stay connected and do great work.

3. **“It’s not OK to blame, shame or attack ourselves or others”** assumes that most of us have learned well how to show our disagreement by making the other person wrong. This happens in direct, indirect, verbal, and non-verbal ways. When we attach, shame, or blame ourselves and others, we are less likely to take in what others are sharing and less likely to problem-solve across our differences.
4. **“Practice self-focus”** assumes that our learning about differences can be accelerated and maximized when we listen to our internal thoughts, feelings, and reactions. When we find ourselves getting irritated with someone about cultural differences, we can blame or shame them or ourselves, or we can figure out internally what is causing our irritation. An effective tool for practicing self-focus is using “I,” rather than “we,” “you,” or “one” statements. When we intend to refer to others, be specific about who those others are – by name or group. In addition, when speaking about our own experience or opinion, use “I have found...” or “I think, I feel, I believe...” and including feeling words, e.g., mad, sad, scared, happy, relieved, etc.
5. **“Notice both the process and content”** means notice both “what we say, “how” and “why” we say or do something and how the members of the group react. For example, notice who’s active and who’s not, who’s comfortable and who’s not, who’s interested and who’s not, including ourselves. Ask about both the process and content and share our own thoughts and feelings too.
6. **“Practice “both/and” thinking”** invites us to see that more than one reality or perspective can be true at the same time (diurnal thinking) rather than seeing reality as strictly either/or, right or wrong, good, or bad, this is that (dichotomous thinking). Using “both/and thinking” can be very helpful in reconciling differences and conflicts that do not represent easy solutions.
7. **“Be aware of both the intent and impact of your actions”** invites us to consider that in cross cultural interactions, our intent might not match our impact. When we have a negative impact on others across culture, ensuring a successful outcome requires changing that negative impact. This guideline requires a willingness to take risks and to exchange and receive honest feedback about the impact of our words and actions on others. It is possible to be well-intentioned AND still say and do hurtful things. To be successful across differences, we must be willing to shift our behaviors and actions such that people who are different from us feel fully valued and included.
8. **“Confidentiality”** invites us to honor personal sharing and to not repeat personal details outside of the group. Confidentiality assumes that feeling free to share in one setting, does not translate into comfort in other settings. So, if we want to bring up information related to a person’s sharing in other settings, we need to privately ask the person if it is acceptable to do so. Confidentiality also assumes that we will not use something someone has shared to hurt them, get them, or punish them later. This is especially important for work groups or teams involving multiple staff or organizational levels. Participants are encouraged to freely share their learnings about theory, practice, and themselves in any setting of their choice.

Questions or comments? Write to COIC@firstparish.org.

Conchords

The Conchords are a six-member mixed a cappella vocal ensemble based at First Parish in Concord. All six are members of the First Parish adult choir. One member has been on sabbatical this year but plans to return.

Beginning in September 2021, the group has rehearsed weekly at First Parish, observing all COVID protocols. Two members of the group have also prepared the ventilation (windows and window fans) in the sanctuary for choir rehearsal each week, and they have closed the sanctuary up again afterward.

In 2021-2022, the Conchords provided musical leadership for the following worship service at First Parish:

- December 5, 2021: Sunday service anthem and leadership of prayer songs and the hymn

The group served the wider community during the fiscal year through performances at these Independent/Assisted Living facilities:

- December 10, 2021: Concord Park in Concord
- December 15, 2021: RiverMead in Peterborough, NH
- December 17, 2021: Brooksby Village in Peabody
- February 14, 2022: RiverMead in Peterborough, NH

The group started the fiscal year with a balance of \$1,168 and ended with a balance of \$1,743 (as of May 10, 2022). Over the course of the year, the group received performance donations of \$1,475 and paid \$400 for rehearsal accompaniment services. Grace Choi, rehearsal accompanist for the First Parish adult choir, also serves as rehearsal accompanist for the Conchords.

In gratitude for the rehearsal space, for the able assistance of Grace Choi, and for the vitality of the music program at the church, the Conchords made a donation of \$500 to the First Parish Music Reserve Fund in March.

We look forward to further opportunities to sing together at First Parish in rehearsal, in worship, and in service to the wider community during the year ahead.

Congregational Life Committee

The Congregational Life Committee (CLC) was created on the recommendation of the Belonging Team Task Force's October 2020 report to the Standing Committee. It was formed in April 2021, so it has just completed its first church year. The committee's mission statement is as follows:

The Congregational Life Committee promotes and nurtures an experience of belonging and a strong sense of connected community at First Parish. The committee aspires to embody the

values of diversity, equity, inclusion, and collaboration while fostering a culture of radical welcome.

In the 2022-2023 church year, the CLC focused on forming as a new committee and on re-energizing the church's welcoming & membership programs that had been interrupted by the pandemic and our year+ of virtual-only church. This past year, the CLC worked on the following:

- The work of forming a new committee:
 - Developing a mission statement and covenant
 - Choosing a method of group decision-making that was consistent with our mission
 - Defining other processes for the committee that reflected the committee's values
- Established and staffed a weekly welcome table that was present during coffee hour after in-person Sunday services. Welcome table volunteers:
 - Greet any guests or church regulars who approach the table
 - Collect contact information for anyone wishing to sign up for FP Weekly or wishing to learn more about the church
 - Pass this contact info on to church staff for their records
 - Follow up with newcomers by sending a handwritten note
- Took responsibility for staffing the Sunday Zoom chat host position for Sunday services. The Zoom chat host:
 - Greets attendees who identify themselves in the chat
 - Stays in touch with the tech about any technical problems being experienced by attendees during the service
 - Answers questions as able
 - Pastes information related to certain parts of the service into the Zoom chat window at the designated time
- With Rev. Liz Weber, the CLC created and offered a 3-session Welcome/Re-Welcome class targeted to FP newcomers but open to all in the FP community. This class focused on:
 - Session I: Spiritual Journeys; UU principles and Covenantal Faith; finding your way into a large church community
 - Session II: UU History and Theology
 - Session III: First Parish Structure, Membership, and Belonging

The class was offered on Nov. 21, Dec. 5, and Dec. 12. Approximately 8-10 people attended the fall class.

- Joined with former membership committee chair Chuck McDonald this spring to make the membership book available to be signed once a month after Sunday service
- Collaborated with the standing committee to organize and host the May 14th May Fair outdoor event at First Parish
- Conducted a volunteer recognition effort for the May 22nd Sunday service
- Offering regular tours of the church, beginning May 2022
- Organized a new member recognition ceremony for the June 5th Sunday service

- Engaged a vendor for the creation of an FP photo directory this fall
- CLC members read the book *Radical Welcome* by Stephanie Spellers and plan to meet to discuss its implications for welcoming at First Parish. The book addresses the question of how we as a church become a place where we are truly welcoming of “the Other,” the marginalized among us.

Lastly, in March, Rev. Howard and Rev. Liz met with representatives from the standing committee, the CLC, and the membership committee to discuss the relationship between the CLC and the now-inactive membership committee. It was agreed that:

- Effective immediately, Chuck McDonald, former chair of the membership committee, would join the CLC
- Effective immediately and for the coming church year (2022-23), the CLC would take on the duties of running and managing the welcoming & membership programs while there can be more dialogue about where long-term responsibility for those programs should reside

Committee members: Jan Power (chair), Lillian Anderson, Sara Ballard, Jeff Brainerd, Jeff Clanon, Teresa Hubscher-Younger, Chuck McDonald, Liz Rust, Susan See, Sophie Wadsworth + staff liaison, Rev. Liz Weber

The CLC can be reached at CLC@firstparish.org.

First Tuesday Group

The First Tuesday group met on the first Tuesday of each month (except July and September), including an atypical outdoor “catch up” meeting in August of 2021, a response to Covid isolation. Between October 2021 and June 2022, meetings were held both in-person and via Zoom, depending on the church’s Covid protocols at the time.

Topics ranged from the spiritual practice of *lectio divina*, led by the Rev. Liz Weber, to a presentation on “Afghanistan & First Parish,” led by Rachel Wheeler. The Steering Committee consists of Linda Benua, Mary Clarke, Jack Nevison, Margie King Saphier, and Nancy McJennett and Anne Fortier, Co-Chairs. We mourn the death of committee member Nancy Cronin this spring, whose wise counsel will be very much missed.

The First Tuesday group continues to center its programming on First Parish seniors and friends, while welcoming those of any age. Based on responses from participants, the group alternates between informational meetings on topics of interest and opportunities to share concerns related to aging. The committee always allows time for participants to share their experiences and concerns in small groups, before or after a presentation.

Flower Committee

OUR MISSION: To provide – through flower arrangements in the Sanctuary – natural beauty and an outdoor connection for Sunday worship services. Through this flower ministry, we hope to create arrangements that are graceful, inspiring and of the moment in nature. In addition, we enjoy the communal spirit of arranging, sharing ideas and fellowship and decorating the Sanctuary together.

WHAT WE DO: We create two large arrangements – one for each side of the pulpit – for every Sunday service. Frequently the flowers and other plant material come from local gardens. The flower committee also creates memorial arrangements donated by parishioners. We are also responsible for the two planters at the church entrance. Occasionally members do arrangements for other First Parish events or locations, but our focus is the Sunday service arrangements and the two planters. We use no First Parish funds. Many of our flowers and other plant material comes from parishioners' yards and gardens. For supplemental, purchased flowers, the Flower Committee raises money through our Holiday memorial poinsettia event and by arranging memorial flowers for a fee. We are committed to maintaining a green sanctuary, and compost all of our plant and flower materials, whenever possible using locally sourced flowers. The committee meets the third Tuesday of September, January and May to plan arrangements for the following season.

WHO WE ARE: Ellen Whitney chairs the Flower Committee. Committee members include Susan Ellsworth, Dinny McIntyre, Helen Stoddard, Donna Peterson, Joy Madden, Petra Betts, Jan Goddard-Taylor, Marty Wallace, Linda Reynolds, Faxon Green and Kathy Spang.

'21 – '22 HIGHLIGHTS: Activities:

- once the church resumed in-person services, provided seasonal flower arrangements for weekly Sunday services
- installed and maintained the planters in the front of the church
- raised funds for flower purchases through the memorial poinsettia fundraiser
- provided seasonal photos of church flower arrangements for First Parish weekly
- coordinated the purchase of poinsettia and lilies for Pastoral Care
- delivered a flower arranging Zoom presentation to parishioners in March

Thank you to Bruce Davidson for watering the planters weekly from April to October, and for his overall extraordinary practical and moral support. We are also grateful to the Pastoral Care team under the guidance of Liz Weber, who spread the beauty and solace of flowers and plants throughout our community.

Respectfully submitted, Ellen Whitney, Chair First Parish Flower Committee

Greening the Campus Task Force

In June, 2020 the Congregation voted to take action to move First Parish off of fossil fuels. The Standing Committee developed a charge (see below) and appointed a task force:

Purpose and Authority of the Task Force

The purpose of the GFPC Task Force is to monitor and advise the Standing Committee and Senior Minister on the development, funding and implementation of projects with the specific goal of reducing and eventually eliminating the use of fossil fuels on the First Parish campus. The Task Force's immediate concerns include but are not limited to: developing a plan for fundraising and executing an engineering design study that will assess parameters around an insulation upgrade to the main sanctuary structure and greening the campus; developing a pro forma, cost estimates, and identifying funding sources for future design and construction fees; and preparing regular updates to both the Standing Committee and the Congregation.

Task Force members include Chair Peter Lowitt, Brad Hubbard-Nelson, Ted Bayne, Kel Keleher, Michael McAteer, Roselyn Romberg, Bruce Davidson, Regina Corrao, Rick Moore and Gail Kharidia.

Working in collaboration with the Trustees who manage the four cottages on our campus, and the Wright Tavern Task Force who are improving that facility in the run up to the 250th anniversary of Lexington and Concord, the Greening the Campus Task force is working to implement the congregational vote to get our First Parish campus off of fossil fuels and into alignment with our UUA principles.

To that end we have the following to report:

- The Sanctuary has been insulated.
- Energy efficient lighting has been installed in the church
- The Trustees have all insulated all four of the cottages
- We have hired LN Consulting, a mechanical engineering firm from Vermont, to make recommendations on an HVAC system which would get us off of fossil fuels and have discussed the pros and cons of incorporating a germicidal UV light component or similar system which will eradicate germs and provide an additional layer of protection to the congregation going forward.
- We are providing measurements of CO2 levels during church services
- With the help of volunteers we conducted an initial blower door test for the Sanctuary to identify air leaks and allow the consultant to accurately model energy usage of our facility
- We had a visit from our mechanical engineering consultant (LN) to research a few open design issues
- We formed a technical subcommittee
- We hired Nashawtuc Architects to work with LN and address Historic District Commission compliance issues

- We are in the process of onboarding a commissioning agent whose task will be to assure that of the systems proposed work as designed.
- We have created requests for proposals for a well operator to dig a well to assess the flow and potential for a ground water geothermal system
- We are thankful to the congregants who have donated their time and funds to get the project to its current state and hope to provide a further update at annual meeting.
- Once LN **prepares specifications and we receive bids for a design-build contract**, we will come back to the congregation for guidance on going forward with fund raising to implement the recommendations

For more information on the task force, please contact Peter Lowitt at peterlowitt1@gmail.com.

Humanist Council

The Humanist Council formed in Jan 2012. It arose from a perceived need for greater recognition of Humanism within the Parish. Over the years it has actively helped keep alive both the Humanist Council and the Concord Area Humanists (CAH).

There are 5 active First Parish members on the First Parish Council. We have 14 members on our Steering Committee. In addition, we have 608 members on our Concord Area Humanists Announcements mailing list and 738 members on our Meetup.com Concord Area Humanists group. Andy Puchrik has been chair since May 6, 2020.

Concord Area Humanists provides UU and FP outreach to Concord and nearby towns, primarily through our monthly programs. During the pandemic CAH, like other organizations, has been holding monthly Zoom events. We have also established a YouTube channel where recordings of our events can be found. As part of our outreach we have been working with the Greater Boston Humanists and Greater Worcester Humanists organizations. We are affiliated with the American Humanists Association.

CAH holds monthly program events with expert speakers on the first Wednesday evening of the month, (except for a summer break). On October 5, 2021, Dr. David Rose spoke on “The Artful Brain – Mona Lisa’s Smile”. On November 3, 2021, Mahtowin Munro spoke on “Massachusetts Indigenous People Legislative Agenda”. On December 1, 2021, Dr. David Kalivas spoke on “Racism and Civil Rights: A Historical Perspective”. On March 3, 2022, Dr. Lee Ostrander spoke on “Are There Too Many People in the World?”. On April 6, 2022, Dr. Avalon Owens spoke on “Strangers in the Night: A Firefly Love Story”. On May 4, 2022, Dr. Paul Carr spoke on “Electric Vehicles: Saving Our Planet”.

For more information on the Humanist Council please contact Andy Puchrik at puchrik@gmail.com.

Jewish Awareness Affinity Group

Beyond exchanging emails on topics of mutual interest, eg current events, entertainment and the arts of a Jewish nature, the Jewish Awareness affinity group has mostly been on hiatus since 2020. The uncertainty of the pandemic has limited our interactions. Beyond email exchanges and phone calls, we have had little interaction; neither has new leadership come forward to sustain the group. The pandemic has interrupted our hosting of a Passover Seder for the congregation, which has been the group's central event. Rev. Amy Freedman was unable to lead that event this year but hopes to continue to do so in future years.

The Jewish awareness group wants to retain the privileges of its chartered group status at FP, in the hopes that in a year's time, the group will regain some momentum.

For FP annual report, 2021-22

Current contact info:

Dana Snyder-Grant, dana.snydergrant@gmail.com

Laura Bernstein, LNRB1943@gmail.com

Lillian Anderson, lillianand@comcast.net

Peter Mitchell, loistm@aol.com

17 on mailing list

Jhamtse Buddhist Group

Leaders: Wednesday morning group: Bill Seaver bill.seaver@gmail.com Thursday evening group: Veronica Brandstrader vbrandst@gmail.com Don Seckler seckler01@comcast.net

We are a group comprised of First Parish members and others interested in Buddhism who meet weekly for Buddhist meditation, study, and fellowship.

We have 8 to 10 regular participants on Wednesday morning, and generally between 6 and 8 on Thursday evening. In the "before times" we were grateful for the opportunity to meet in the beautiful First Parish chapel. We meet through Zoom, and when transmission rates wane enough to allow it, the Thursday group meets monthly in the First Parish chapel with proper precautions in place.

Our numbers of participants have held steady during the pandemic. Both the Wednesday and Thursday meetings now regularly include participants who live out of state or are traveling.

We generally begin our meetings with a few minutes of informal greeting followed by a period of silent meditation (30 minutes), and Buddhist prayer. Then we do teachings for the balance of the 90-minute meeting, with a brief concluding prayer.

Once per month we are fortunate to have "live" teachings by David Tucker of Creative Wellsprings, an experienced local teacher and student of Buddhism. Another benefit of virtual meetings is that the group's founder, Lobsang Phuntsok, has been able to join us from India for

several Thursday evening sessions. These precious sessions that bring us back to our roots are also recorded and shared with group members.

During other sessions our teaching consists of reading both “popular” and traditional Buddhist texts or watching videos by acclaimed teachers, then discussing them within the group. Even the more experienced Buddhist students among us find that there is a great deal to learn from sharing with others.

We are always happy to have new participants, including people who don't have experience with meditation or Buddhism and just want to check it out. New people are welcome to join us in person or by zoom anytime.

Microfinance Group

Members: Toby Smith Ropeik (chair), Mary Ann Barton, Biff Holt, Karen Kashian, Alice Kaufman, Michael McAteer, David Ropeik, Martha Soper, M. Lou Toussaint, Alice Van Deusen

As of April 26, 2022, First Parish has donated a total of \$3,769 toward KIVA.org microloans. That money (and ongoing repayments from earlier loans) has been used to make 556 separate loans to individuals in 47 countries, totaling \$14,550.

In addition, we have donated an average of \$.74 per loan to KIVA.org toward overhead costs.

During this church year, in November 2021, the Microfinance Group was the beneficiary of the church's Sunday Share the Plate contributions. This increased our microfinance lending funds by \$1500.

Our priorities in selecting loans continue to be guided by the interests identified by the First Parish Community (i.e. advancing racial and immigrant justice, helping women, supporting environmental action, promoting diversity).

Ministerial Intern Committee

Leadership Contact Information:

Neil Brock (co-chair): nab9315@gmail.com
978-761-1058

Clem Tarpey (co-chair): clemtarpey@gmail.com
(978) 289-7733

Membership Count:

6 active members. Working to add one or two more.

Activities 2021-2022

Unfortunately we were unable to identify an internship candidate in the fall/winter of 2021 for the 2022-2023 church year. The candidate pool was very small, and we did not receive applications. This could be due to Covid-19 or other factors, and we are investigating the reasons.

We will determine, in conjunction with the soon to be identified interim minister and Standing Committee, whether the church can support an intern during the 2023-2024 church year.

Moms Connection Group

Leadership Contact Information: Jennifer Izzo (jenbizzo3@gmail.com) and Dana Lissy (dana.lissy@gmail.com)

First Parish Mom's Connection Group is a group by and for First Parish moms to socialize, build a support network, and share resources and ideas about raising kids in an ever-changing world. Established under the guidance of the Women's Parish Association, the group helps moms connect and support each other as we navigate the Unitarian Universalist parenthood journey.

The Mom's Connection Group does not have regularly scheduled meetings. Instead, we typically plan activities throughout the year, depending upon current events and members' interests and availability. All FP moms are welcome.

The group was less active than usual in 2021–2022 due to the Covid pandemic and the need to social distance, but we hope to reinvigorate the group in the coming months. We welcome ideas for activities. What is nice about the group is that anyone can organize an event.

We use a Google Group email distribution list to keep in touch, share information, solicit advice, and promote upcoming events. There are currently 57 members on the list. To request to join, please email Dana Lissy at dana.lissy@gmail.com or Jennifer Izzo at jenbizzo3@gmail.com.

The Mom's Connection Group fulfills the strategic ends and mission of First Parish as follows:

- The group was founded under the guidance of the Women's Parish Association, a long-established group within First Parish that supports women, church needs, education, charity work, and social aspects of the church.
- Each of us is a part of the larger church community, integrated in worship, religious education, and social justice work.
- Our membership, while mostly mothers within the First Parish community, welcomes all to participate.
- Our support of First Parish moms is local in nature and in keeping with both our Unitarian Universalist faith and mothers' needs and well-being.

Pastoral Care Council

Members of the Pastoral Care Council are: Mary Ann Barton, Enid Boasberg, Judy Dembsey, Sue Dobbie, Virginia Taylor and Fred Van Deusen.

Due to the COVID 19 Pandemic and the church building closing, no activities or meetings of the Council were held. Hopefully, the Council will be activated this fall.

Judy Dembsey
Chairperson

Photography Club

Our Photo Club Mission Statement:

“The First Parish Photography Club serves to encourage its members to learn and grow while enjoying their practice of photography. We strive to maintain a standard of activities and conduct in keeping with the mission and values of First Parish and the wider UU community”

Club Information

We are a non-competitive Club, open to First Parish adults at every level of skill and experience. We have approximately 30 active club members, ranging from beginners to professionals. We meet monthly, except for July and August, on the second Saturday of the month. In spite of the COVID 19 pandemic we continued to hold our regular monthly meetings throughout the church year by using Zoom. We were unable to conduct our in-person Annual Exhibit again this year, but we did compile our annual slideshow that we viewed at our May meeting.

The Club's Funding comes from member contributions of \$2.00 per person per meeting. This is used to pay for Club expenses and to reimburse First Parish for meeting room usage. As we did not meet in person at all in the past year, these fees were not collected, nor was a donation made to First Parish for meeting room usage.

Content: We generally have two interactive presentations each month by club members, and occasionally professional photographers, on a variety of photographic topics. We have tutorials to learn about various photography techniques; themes where we ask members to take photos about a particular theme; and slideshows that members prepare and show. We often share a few photos at the beginning of the meeting.

Tutorials: Exploring Landscapes by a National Geographic Master of Photography

Themes: Portraits, Fall and Winter Holidays, October Farm Calendar, Mushrooms and Other Fungi, Bare Hill Pond Video, Summer

Slideshows: Annual Members Exhibit, Southwest, Eastern Europe, Fall Foliage in New England, Fun Birdhouses in Kennebunk, Silk Road in Uzbekistan, Gardens of Mount Desert Island, Danube Bike Ride, Painted Hills, Spain, Flood in Paris, Northern Italy

Field Trips: We were able to hold our annual field trip to Bare Hill Pond in October Report submitted by Kathleen Elcox and Fred Van Deusen (Co-Directors)

Transcendentalism Council

About us: The Transcendentalism Council offers opportunities to learn about the Transcendentalists and their contributions to the intellectual, spiritual, and philosophical life of Concord and First Parish. We are committed to the study and preservation of the rich heritage of our congregation. We sponsor lectures, exhibits, performances, classes, tours, and maintain a Facebook page. Our mission includes community outreach and collaboration with the Concord historical community. Our programs include both live in-person lectures and webinars; recordings of our programs are archived on our YouTube page. Our mailing list is approx. 200 people; active Council members: 4 or more; all are welcome to join the Council. During 2021-22, 200 to 300 people participated in our programs.

Report of activities for 2021-22:

Tuesday, September 28, 2021, virtual event

Anke Voss

Embraced by the Transcendentalists: Concord Authors in the Concord Library's Special Collections

Special Collections Curator Anke Voss explained the historical context of artwork and manuscripts related to Transcendentalist authors such as Alcott, Emerson, and Thoreau.

Saturday, October 30, 2021, in-person event at Parish Hall and live streamed

Barry M. Andrews

American Sage: Spiritual Teachings of Emerson

Unitarian minister Barry Andrews shared his insights on the spiritual significance of Emerson's writings.

Free event offered as part of the Concord Festival of Authors

Monday, November 8, 2021, virtual event

Sam Williams

Social Justice and Prison Reform

Executive Director of Concord Prison Outreach Sam Williams discussed strategies to address mental health challenges facing incarcerated men and women.

Tuesday, March 22, 2022, virtual event

Jayne Gordon

Reflections on the Rivers—William Brewster and Henry Thoreau

Historian Jayne Gordon compared the legacies of two naturalists with a passion for Concord's

waterways. William Brewster, the first president of the Mass Audubon Society, is the subject of an exhibition at the Concord Museum called “Alive with Birds.”

Saturday, May 21, 2022, in-person guided 2-hour walk

Brian Donahue

Changes in the Land along the Battle Road

We will walk from the Meriam House to Samuel Brooks house along the Battle Road trail--about a mile and a half. Brandeis professor Brian Donahue will talk about how the land and waterways have changed over time, and how they have been used by the many generations who have lived here.

Tuesday, May 24, 2022, virtual event

Magnificent Souls: Lidian Jackson Emerson and the Transcendentalists

Author Amy Belding Brown will share her research into the life of reformer Lidian Jackson Emerson, the subject of Brown’s work of historical fiction called Mr. Emerson’s Wife.

Sunday, July 10, 2022, in-person at First Parish sanctuary and on Zoom

Rev. Jim Sherblom

Globally Transcendental

Sermon coinciding with The Thoreau Society Annual Gathering

In 2022, we established a separate YouTube channel for the Transcendentalism Council of First Parish in Concord. Recordings of our past programs are accessible at this link:

<https://www.youtube.com/channel/UC1H021BcFrXpEC-XeRDBsDA>.

In October 2021, Rev. Jim Sherblom organized three boxes of sermons and letters by Rev. Benjamin Reynolds Bulkeley (1855-1930) after a descendent delivered them to First Parish. They are now part of First Parish archives at the Concord Free Public Library Special Collections.

Respectfully submitted May 18, 2022,

Victor Curran, Shelley Hawks, Jim Sherblom, Dianne Weiss

Steering Committee of the Transcendentalism Council of First Parish in Concord

Shelley Hawks: Shelley_Hawks@msn.com

Dianne Weiss: diannemcweiss@comcast.net

Victor Curran: vacurran@comcast.net

Jim Sherblom: jimsherblom@gmail.com

Women's A.M./P.M. Book Group

The Women's Book Group began as a monthly morning book discussion group in the fall of 1992, started by Margaret Stewart, who was then the First Parish church administrator as well as a church member. The group was an instant success and within a few years, an evening session was added due to popular demand. The AM/PM format continues and draws a regular core to each session, along with those who drop in occasionally. Women are invited to attend either or both discussions in any given month. The group is open to all women of First Parish and friends they wish to invite.

2021-2022 was the 30th year of the Book Group and was again a year of good discussions about eight chosen books, both fiction and nonfiction. Darien Smith again facilitated the morning group and Siri Smedvig the evening group. The evening sessions were held on Mondays and the morning sessions on Tuesdays. Due to the continuing pandemic conditions, all discussions were held via Zoom and generally had 8-12 participants. Our founder, Margaret Stewart, who now lives in Arizona, was able to be a regular participant again this year due to meeting on Zoom and we had a few other participants who no longer live in the area as well. While we prefer to meet in person, we have found our discussions to work well in the Zoom format. Zoom discussion is certainly preferable to being in-person with masks and distancing.

The books read are drawn from contemporary fiction and nonfiction to classics and occasionally poetry. The books this year resulted in excellent and many-layered discussions. Of particular note were the memoirs *The Education of an Idealist* and *The Girl with Seven Names*, along with the classic novel *To Kill a Mockingbird*, which was so interesting to revisit with today's perspective on racial justice.

Books are chosen in June of each year at a single event for both the morning and evening groups and will be via Zoom this year. Books are suggested and voted on, followed by the facilitators and Margaret Stewart reviewing the tally to make the final decisions, only going below the top eight choices on occasion to help make the list a good balance of fiction, nonfiction, genre, and topics.

The recommendation guidelines are that books should meet at least one of the following criteria:

- have women authors **or**
- pertain to women's issues **or**
- include strong character development **or**
- strong spiritual content.
(i.e. male authors are fine if the book fits one of the other categories)
- **All** should have good potential for great discussion and have been previously read by the recommender or one other book group participant.

This year we read: (F is for Fiction, NF for Nonfiction)

Sept 27/28	<i>The Girl Who Wrote in Silk</i> - F - Kelli Estes
Oct 25/26	<i>The Education of an Idealist: A Memoir</i> - NF - Samantha Power
Dec 6/7	<i>To Kill a Mockingbird</i> - F - Harper Lee
Jan 24/25	<i>The Book of Longings</i> - F - Sue Monk Kidd
Feb 21/22	<i>The Street</i> - F - Ann Petry
Mar 28/29	<i>The Girl with Seven Names</i> - NF - Hyeonseo Lee
Apr 25/26	<i>The Vanishing Half</i> - F - Brit Bennett
May 23/24	<i>The Henna Artist</i> - F - Alka Joshi

The Women's AM/PM Book Group looks forward to its 31st year in 2022-2023, and we hope to be able to meet in person. However, we will see if it can work for some to join by Zoom, if they can't be there physically.

Darien and Siri will be continuing as facilitators.

Respectfully submitted,
Darien Smith

Women's Goddess Covenant Circle

Our group averages about thirteen active members with new members joining and some members leaving the Circle.

During this second Pandemic Year we continued to meet two or three times a month, mostly on Zoom and a few times in person at First Parish. An advantage of Zoom is that it allows our geographically distanced members, who formerly would have had to drop out when they moved away, to gather with us again. Our model of shared leadership continues to serve us well, where members take turns leading our gatherings. We welcome all interested women to consider membership in our explorations of Earth- and Goddess-centered spirituality.

First Parish members include Darien Smith, Bozena Smith, Joyce Biggs, Linda Benua, Margaret Stewart, Suzanne Foley, Susan See, and Suzie Weaver

Darien Smith is our First Parish Contact Person

Women's Parish Association

The Women's Parish Association has had a productive year despite not being able

to offer in-person events during the cold-weather months. We have focused on contributing to charities and other worthy causes through financial donations and contributions of time and talents to various social action projects. We have continued to give financial support to our charities whose primary focus is on improving women's and families' lives even at a time when we have not been able to hold our normal fundraising activities due to the pandemic.

We have also continued our financial and planning support to First Parish with our maintenance of the Ruth Johnson Garden and the Deborah Greeley Memorial Herb Garden. These gardens provide places of beauty and contemplation for those who visit them and provide convenient and pleasant outdoor meeting places throughout the spring, summer and fall for a variety of First Parish groups in need of safe, outdoor venues. Additionally, we purchased lighter weight tables for general use by the First Parish community for social and business meetings, and dining events.

We have continued our involvement with and support of social action initiatives and programs this past year and look forward to ongoing collaboration with various groups involved in social action. Marilyn Lowitt is the WPA liaison to First Parish's social action groups and keeps the WPA informed of their programs and activities. In addition to giving financial support to specific organizations involved in social action, we sponsored the Holiday Gift Bag Project in which gift bags were prepared for women incarcerated at the MCI-Framingham and people incarcerated at other Massachusetts Correctional Institutions. In addition to providing financial support, WPA members assembled the bags of toiletries and holiday greetings. Special thanks to Marilyn for her coordination efforts in this very worthy cause.

The WPA has given financial assistance to the Immigration Justice Task Force's Afghan Refugee Settlement Program of local faith communities under the auspices of the International Institute of New England. This program is providing volunteer assistance to help a family of eleven people in Lowell, Massachusetts as they settle into their new lives. Additionally, the WPA is currently selling sunflower seed packets to raise funds for Ukrainian refugees.

For over 60 years, the WPA has participated with other faith communities in Concord's commemoration of the annual World Day of Prayer. Due to Covid-19, the Concord Area World Day of Prayer Committee held a reduced commemoration this year. The service was written by women of Great Britain who shared stories of people who found themselves in foreign lands as refugees or temporary workers. Informed prayers, prayerful action and thoughtful fundraising were all part of this year's commemoration and prayer service.

In coordination with the First Parish's Environmental Action Team, the WPA continued to call attention to David Green's work and webinars about achieving a zero-carbon footprint at home and informing our membership of activities associated with keeping the planet safe for human habitation. Much of what was presented in David Green's original webinar and ongoing webinars and discussions will continue to help house

owners and public building owners to reach critical goals. The WPA is exploring ways to educate people of the greater Concord area about effective ways to reduce carbon, methane and other pollutants for future programs and is using project Drawdown's research findings as a guide to the most efficient and effective ways to do so.

Our fundraising programs included the popular sales of catnip balls during the holiday season. We are now preparing for our outdoor Summer Artisans Fair 2022 which will take place on June 11th from 10 a.m. to 4 p.m. with a rain date of June 25th. Check FP Weekly for updates. It is our hope that we can return to previous levels of fund raising so that we can continue to support First Parish, our charities and other good causes.

In addition to the Zoomed board meetings and social chat sessions provided to keep our board members connected during the restrictions presented by Covid, we are planning to hold some outdoor social events for First Parish at large during the summer so that people can connect with each other in safe and pleasant venues.

We welcome First Parish women to become members and friends of the Women's Parish Association, and all First Parish members and friends and their families are most welcome at all our events. Our membership chairperson is Lois Whitney, and she will be most happy to share information about our organization.

Many thanks to Janet Bailey who served as President during the past two years. It was a real pleasure working with you! Let me add heartfelt thanks to other members of our Board: Vice-President, Mary King; Treasurers, Lauren Evans and Carol Boris; Recording Secretary, Irmi Doane; Corresponding Secretary, Lois Suarez; Program Co-Chair Susan Page; Membership Chair, Lois Whitney; Social Action Liaison, Marilyn Lowitt; Transylvanian Student Liaison, Deb Allen; Linda Benua; Priscilla Smith; and Melita Teichert. Also, many thanks to Linda Reynolds who has retired from the Board, for her many years of dedicated service. It has always been a pleasure to work with Linda and we wish her well in her new adventures.

Many thanks to Facilities Manager Bruce Davidson as he completes his first year at First Parish. His dedicated efforts to ensure that First Parish's buildings and grounds are all in order provide very pleasant surroundings for us all.

Special thanks to Senior Minister Reverend Howard Dana for his continued support of the WPA during these past 9 years. His support is greatly appreciated. We wish him much future joy and success!

I can't close without thanking all those who given ongoing support to our faith community and to WPA programs and activities. It's been an honor and a pleasure to serve as President of the WPA. May our efforts help bring more peace and joy to all.

Respectfully submitted,

Dian Pekin, President
The Women's Parish Association

Women's Retreat Planning Committee

Due to the pandemic we did not plan or hold our annual in-person women's retreat this year, but this winter and spring we hosted two successful events on Zoom for the women of First Parish, based on our retreats format. The themes for the two events were Women Connecting and Re-Connecting and Women Emerging and Re-Connecting. Attendance was strong with about 40 women and 30 women participating at each of the two weekends. We are happy to have provided this opportunity for connection for women familiar and not familiar with our regular retreats, and we plan to host similar events in the future until we can safely retreat in person again.

Committee Members who are First Parish members include Lillian Anderson, Darien Smith, Holly Cratsley, and Bozena Smith. Syd Miller, a friend of FP, is also on the committee.

Lillian Anderson is the First Parish contact person

Financial Reports

Profit and Loss

1:37 PM
08/01/22
Accrual Basis

First Parish in Concord Profit & Loss Budget Performance

		Jun 22	Jul 21-Jun 22	YTD Budg	\$ Over Budg	Ann'l Budg	Budg Rmng	Notes
	Income							
	3010 · Contribution Income					1,080,000		Actual pledges, from 371 hholds, were \$1,078,268, \$1,732 (97% = \$1,680) under (97% = \$1,045,920)
	3020 · Current Year Pledge Income	37,366	1,043,788	1,047,600	(3,812)	1,047,600	3,812	97% budgeted pledges (to allow for 3% anticipated unpd pledges); actual very close considering loss of \$25k pledge (2.3%); actual 96.6% pd this yr + next yr's Prior Year Pledge Payments
	3050 · Prior Yr Pledge Payments	0	19,449	15,000	4,449	15,000	(4,449)	FY21 budget same as FY22's: \$1,080,000 budgeted pledges, \$1,077,543 actual pledges, 97% budgeted pledges (for unpd) \$1,047,600 vs \$1,035,877 actual pd = 96% actual pd, 4% actual unpd; adding \$19,499 pd this yr as Prior Year Pledge Payments = \$1,055,326 total pd for FY21 = 97.7% total pd, 2.3% unpd
	3060 · Offset Credit Card Fees	52	1,214	1,300	(86)	1,300	86	
	3110 · Plate Collections	2,026	25,034	31,000	(5,966)	31,000	5,966	Down by avg \$500/mo
	3120 · Share the Plate (pass-through)	2,026	22,343	27,000	(4,657)	27,000	4,657	Pass-through--no effect on net inc
	3122 · Christmas Eve collection ps-thr	0	8,318	8,000	318	8,000	(318)	Pass-through--no effect on net inc
	3124 · Disaster Relief collectn ps-thr	0	0	6,000	(6,000)	6,000	6,000	Pass-through--no effect on net inc
	3330 · Gifts	240	7,917	14,000	(6,083)	14,000	6,083	
	Total 3010 · Contribution Income	41,710	1,128,063	1,149,900	(21,837)	1,149,900	21,837	
	3130 · Users of Facilities	2,862	21,327	20,000	1,327	20,000	(1,327)	MNS 10 months rent + \$2,700 other
	3140 · Trustees Income							
	3150 · Trustees of Parish Donations	12,054	144,648	144,648	0	144,648	0	
	Total 3140 · Trustees Income	12,054	144,648	144,648	0	144,648	0	
	3185 · Coan House Rental Income	1,600	14,400	9,600	4,800	9,600	(4,800)	Unbudgeted upstairs tenant January-June @ \$800/mo
	3350 · Interest Income	12	760	1,250	(490)	1,250	490	Rates kept dropping until negligible
	3360 · SREC (solar panel) income	0	7,932	8,000	(68)	8,000	68	All 24 2020 SRECs (finally) sold
	3370 · Miscellaneous Income	0	40	350	(310)	350	310	
	3390 · Special Events Income	0	25,000	25,000	0	25,000	0	Final 2018 Auction proceeds used
	Total Income	58,238	1,342,170	1,358,748	(16,578)	1,358,748	16,578	

1:37 PM

08/01/22

Accrual Basis

First Parish in Concord **Profit & Loss Budget Performance**

Expense							
4010 · Minister Staff							
4020 · Senior Minister	19,616	152,339	152,339	0	152,339	0	\$141,513 salary + 10,826 SECA in lieu of employer-pd FICA
4030 · Minister for Pastoral Care	11,537	89,599	89,599	0	89,599	0	\$83,232 salary + \$6,367 SECA in lieu of employer-pd FICA
4040 · Guest Ministers	2,200	13,860	12,800	1,060	12,800	(1,060)	GMs: 5 @ \$300 + 2 @ \$385 (increased to UUA rate per LW); bal \$11,590
Total 4010 · Minister Staff	33,353	255,798	254,738	1,060	254,738	(1,060)	Zoom/livestream techs
4150 · Minister Development							
4160 · Senior Minister Prof'l Dev & Exp	6,970	12,465	14,151	(1,686)	14,151	1,686	
4170 · Minister P C Prof'l Dev & Exp	7,730	7,730	8,323	(593)	8,323	593	
Total 4150 · Minister Development	14,700	20,195	22,474	(2,279)	22,474	2,279	
4300 · Professional Development							
4310 · Staff Professional Development	1,359	1,903	2,000	(97)	2,000	97	Budgeted amt back up to \$5,500 FY23
Total 4300 · Professional Development	1,359	1,903	2,000	(97)	2,000	97	
4400 · HR Benefits and Taxes							
4410 · Social Security Taxes (FICA)	4,311	33,165	35,754	(2,589)	35,754	2,589	Anticipated to be \$3,051 under budget
4450 · Retirement Plan	2,444	69,369	70,717	(1,348)	70,717	1,348	Expected ~ \$1,900 savings SAM
4460 · UUA Group Insurance	978	11,457	14,352	(2,895)	14,352	2,895	Reviewed FY22 budgeted #'s - all seem sound
4470 · Health Insurance	3,958	63,323	72,546	(9,223)	72,546	9,223	Expected ~\$8,500 under budget SAM
Total 4400 · HR Benefits and Taxes	11,691	177,314	193,369	(16,055)	193,369	16,055	
4500 · Parish Activities							
4510 · Worship Aesthetics	22	77	600	(523)	600	523	
4530 · Coffee Hour / FP Cafe	868	1,924	3,300	(1,376)	3,300	1,376	
4550 · Pastoral Care	0	212	500	(288)	500	288	
Total 4500 · Parish Activities	890	2,213	4,400	(2,187)	4,400	2,187	
4700 · Member Services							
4720 · New Membership	741	1,677	3,000	(1,323)	3,000	1,323	\$325 UU Pocket Guide; bal Mayfair
4750 · Sustaining Membership	0	0	400	(400)	400	400	
Total 4700 · Member Services	741	1,677	3,400	(1,723)	3,400	1,723	
4800 · Social Action							
4830 · Share the Plate to recipients	4,007	22,343	27,000	(4,657)	27,000	4,657	Avg \$2,234/mo vs \$2,700; all pass-through
4835 · Christmas Eve distributions	0	8,318	8,000	318	8,000	(318)	Mailed Christmas Eve donation request this year--went very well!
4840 · Disaster Relief distributions	0	0	6,000	(6,000)	6,000	6,000	No pass-through FY22
4845 · Social Action Participation	3,648	5,777	9,000	(3,223)	9,000	3,223	Incl \$3k to Green Campus this mo
4855 · Social Action Supplies	(25)	0	0	0	0	0	
4860 · Social Action Manager	7,630	39,853	60,603	(20,750)	60,603	20,750	Position vacant Sept 2021-Jan 2022
4865 · Social Action Manager expenses	775	1,250	2,500	(1,250)	2,500	1,250	PLD started January 2022; full \$2,500 budgeted FY23
Total 4800 · Social Action	16,035	77,541	113,103	(35,562)	113,103	35,562	
5000 · Lifespan Religious Education							
5050 · Religious Education Staff							
5060 · Youth Programs Leadership	500	7,900	9,000	(1,100)	9,000	1,100	
5075 · Assistant Director of RE	5,026	39,033	39,033	0	39,033	0	
5080 · Religious Ed Director/Minister	11,537	89,599	89,599	0	89,599	0	\$83,232 salary + \$6,367 SECA in lieu of employer-pd FICA
5082 · Dir/Min RE Prof'l Expenses	1,746	3,659	8,323	(4,664)	8,323	4,664	
Total 5050 · Religious Education Staff	18,809	140,191	145,955	(5,764)	145,955	5,764	
5150 · Religious Education Operations							
5160 · Childcare (0-4 yrs.)	0	0	2,500	(2,500)	2,500	2,500	None this year
5205 · OWL (Our Whole Lives) - all	2,000	4,000	4,000	0	4,000	0	Teacher stipend
5215 · RE Special Guests	0	100	500	(400)	500	400	
5220 · Coming of Age - 9th grade	558	(324)	0	(324)	0	324	Parents pay fees for overnights, etc.
5240 · Sr. High Youth Group	(2,000)	92	500	(408)	500	408	OWL teacher stipend here in error, moved to 5240
5295 · RE Supplies & Appreciation	504	1,343	2,000	(657)	2,000	657	
Total 5150 · Religious Education Operations	1,062	5,211	9,500	(4,289)	9,500	4,289	
Total 5000 · Lifespan Religious Education	19,871	145,402	155,455	(10,053)	155,455	10,053	

1:37 PM

08/01/22

Accrual Basis

First Parish in Concord **Profit & Loss Budget Performance**

	5400 · Music							
	5410 · Contract Musicians	0	900	3,000	(2,100)	3,000	2,100	
	5450 · Music Staff							
	5460 · Music Director	10,751	83,484	83,484	0	83,484	0	
	5470 · Music Director Profl Expenses	0	3,147	8,348	(5,201)	8,348	5,201	under budget
	5480 · Organist	2,506	20,498	20,498	0	20,498	0	
	5482 · Guest Organists/Accompanist	950	11,586	9,450	2,136	9,450	(2,136)	over budget
	5486 · Gospel Ensemble Director	1,518	11,781	11,781	0	11,781	0	
	5487 · Children's Choir Director	1,010	10,700	10,200	500	10,200	(500)	over budget
	Total 5450 · Music Staff	16,735	141,196	143,761	(2,565)	143,761	2,565	
	5510 · Music and Material	20	2,873	5,000	(2,127)	5,000	2,127	
	5530 · Instrument Maintenance	200	4,941	6,600	(1,659)	6,600	1,659	incl \$200/mo moved to savings for possible future major organ repair
	Total 5400 · Music	16,955	149,910	158,361	(8,451)	158,361	8,451	
	5600 · Administration							
	5700 · Administration Operations							
	5710 · Telephone Services	265	4,346	3,800	546	3,800	(546)	
	5730 · Office Supplies	97	1,875	2,700	(825)	2,700	825	
	5740 · Technology and Equipment	532	14,624	14,500	124	14,500	(124)	
	5750 · Publications and Printing	994	1,203	1,400	(197)	1,400	197	Annual Reports x 2; directories
	5770 · Postage	60	3,964	4,000	(36)	4,000	36	
	5790 · Equipment Leases	696	9,591	10,900	(1,309)	10,900	1,309	
	5810 · Payroll Services	224	2,258	2,900	(642)	2,900	642	
	5820 · Cr card, auto debit, stock fees	334	4,684	6,000	(1,316)	6,000	1,316	
	5830 · Administrative Misc.	5,471	7,880	1,500	6,380	1,500	(6,380)	\$6,726 HD goodbye; \$748 SC exp
	Total 5700 · Administration Operations	8,673	50,425	47,700	2,725	47,700	(2,725)	
	5900 · Administrative Staff							
	5950 · Director of Finance & Operations	9,378	72,828	72,828	0	72,828	0	
	5960 · Dir Finance & Ops Assistant	4,003	31,082	31,082	0	31,082	0	
	5970 · Church Administrator	7,078	52,960	52,663	297	52,663	(297)	Left 6/3/22; pd accrued vacation leave
	Total 5900 · Administrative Staff	20,459	156,870	156,573	297	156,573	(297)	
	Total 5600 · Administration	29,132	207,295	204,273	3,022	204,273	(3,022)	

1:37 PM

08/01/22

Accrual Basis

First Parish in Concord **Profit & Loss Budget Performance**

	6000 - Property Plant & Equip							
	6050 - Sexton Staff							
	6070 - Sexton	9,182	71,400	71,400	0	71,400	0	
	6110 - Other Maintenance Staff	693	7,141	10,200	(3,059)	10,200	3,059	Mostly weekly cleaning
	Total 6050 - Sexton Staff	9,875	78,541	81,600	(3,059)	81,600	3,059	
	6100 - Plant Operations							
	6150 - Fuel Oil	0	27,491	24,000	3,491	24,000	(3,491)	Rates spiked at season's end/April
	6160 - Utilities	926	12,494	19,000	(6,506)	19,000	6,506	Actual FY21 was \$12,500 (same);
	6170 - Insurance	801	16,712	15,700	1,012	15,700	(1,012)	anticipated increase / more use of the
	6190 - Building Supplies	764	6,283	8,000	(1,717)	8,000	1,717	building; budgeted \$13,500 FY23
	6210 - Equipment & Furnishings	294	8,373	8,000	373	8,000	(373)	Expected \$5,500 over budget for air
	6225 - Building Maintenance	1,754	23,430	25,500	(2,070)	25,500	2,070	purifiers, fans, fire tables, propane tnks
	6230 - Landscaping & Snow Removal	3,128	30,195	26,000	4,195	26,000	(4,195)	FY21 was \$1,500 over \$25k budget; this
	6235 - Facilities Repair	(2,475)	25,197	29,000	(3,803)	29,000	3,803	yr FY22 \$4,200 over \$26k budget; FY23
	Total 6100 - Plant Operations	5,192	150,175	155,200	(5,025)	155,200	5,025	budg \$27k
	6220 - PP&E Additional Expenses	3,422	5,133	1,000	4,133	1,000	(4,133)	Expected to be \$9,500 overbudget for
	Total 6000 - Property Plant & Equip	18,489	233,849	237,800	(3,951)	237,800	3,951	copper corner roof
	7000 - Denominational Support							\$3,671 for 2 EWR paintings incl \$3,075
	7010 - UUA Annual Program Fund	0	74,097	74,097	0	74,097	0	profl cleaning & restoration; tent \$1,463;
	7040 - Ministerial Intern	500	4,100	3,600	500	3,600	(500)	FY23 budg \$4,000 mostly tent
	7050 - GA Registration	350	600	2,500	(1,900)	2,500	1,900	
	7080 - PCC Program Support	0	211	900	(689)	900	689	
	Total 7000 - Denominational Support	850	79,008	81,097	(2,089)	81,097	2,089	
	7150 - Governance and Finance							
	7180 - Fundraising Costs	0	1,779	2,500	(721)	2,500	721	
	Total 7150 - Governance and Finance	0	1,779	2,500	(721)	2,500	721	
	Total Expense	164,066	1,353,884	1,432,970	(79,086)	1,432,970	79,086	1,323,223
Net Income		(105,828)	(11,714)	(74,222)	62,508	(74,222)	(62,508)	

Profit & Loss Short

1:38 PM

08/01/22

Accrual Basis

First Parish in Concord Profit & Loss Budget Performance

		Jun 22	Jul 21-Jun 22	YTD Budg	\$ Over Budg	Ann'l Budg	Budg Rmng
	Income						
	3010 · Contribution Income	41,711	1,128,064	1,149,900	(21,836)	1,149,900	21,836
	3130 · Users of Facilities	2,862	21,327	20,000	1,327	20,000	(1,327)
	3140 · Trustees Income	12,054	144,648	144,648	0	144,648	0
	3185 · Coan House Rental Income	1,600	14,400	9,600	4,800	9,600	(4,800)
	3350 · Interest Income	12	760	1,250	(490)	1,250	490
	3360 · SREC (solar panel) income	0	7,932	8,000	(68)	8,000	68
	3370 · Miscellaneous Income	0	40	350	(310)	350	310
	3390 · Special Events Income	0	25,000	25,000	0	25,000	0
	Total Income	58,239	1,342,171	1,358,748	(16,577)	1,358,748	16,577
	Expense						
	4010 · Minister Staff	33,353	255,798	254,738	1,060	254,738	(1,060)
	4150 · Minister Development	14,700	20,195	22,474	(2,279)	22,474	2,279
	4300 · Professional Development	1,359	1,903	2,000	(97)	2,000	97
	4400 · HR Benefits and Taxes	11,690	177,315	193,369	(16,054)	193,369	16,054
	4500 · Parish Activities	890	2,213	4,400	(2,187)	4,400	2,187
	4700 · Member Services	741	1,677	3,400	(1,723)	3,400	1,723
	4800 · Social Action	16,034	77,542	113,103	(35,561)	113,103	35,561
	5000 · Lifespan Religious Education	19,872	145,401	155,455	(10,054)	155,455	10,054
	5400 · Music	16,955	149,910	158,361	(8,451)	158,361	8,451
	5600 · Administration	29,132	207,296	204,273	3,023	204,273	(3,023)
	6000 · Property Plant & Equip	18,488	233,848	237,800	(3,952)	237,800	3,952
	7000 · Denominational Support	850	79,008	81,097	(2,089)	81,097	2,089
	7150 · Governance and Finance	0	1,779	2,500	(721)	2,500	721
	Total Expense	164,064	1,353,885	1,432,970	(79,085)	1,432,970	79,085
	Net Income	(105,825)	(11,714)	(74,222)	62,508	(74,222)	(62,508)

Balance Sheet

1:47 PM
08/01/22
Accrual Basis

First Parish in Concord
Balance Sheet
As of June 30, 2022

	Jun 30, 22	May 31, 22	\$ Change	Notes
ASSETS				
Current Assets				
Checking/Savings				
1000 · Cash				
1010 · Petty Cash	200	74	126	
1040 · Cash - Cambridge Trust Chk Oper	344,479	930,080	(585,601)	Incl \$270k & \$212,524 moved to Fidelity accts--all still FP cash
1047 · CT Promo Premium Savings II	510,386	510,382	4	
1057 · Fidelity 1	270,000	0	270,000	Simmons gift restricted fund for 3 more years
1058 · Fidelity 2	212,524	0	212,524	Closed CDs tred to Fidelity hoping to earn better interest
Total 1000 · Cash	1,337,589	1,440,536	(102,947)	
Total Checking/Savings	1,337,589	1,440,536	(102,947)	
Accounts Receivable				
1200 · Accounts Receivable	215	277	(62)	
Total Accounts Receivable	215	277	(62)	
Other Current Assets				
1300 · Suspense	(92,456)	(364,692)	272,236	Funds waiting to be offset by repmts or determinations
1350 · Prepaid Expense/Deferred Income	22,141	257	21,884	Paid in FY22 for services in FY23
1499 · Undeposited Funds	0	212	(212)	
Total Other Current Assets	(70,315)	(364,223)	293,908	
Total Current Assets	1,267,489	1,076,590	190,899	
Fixed Assets				
1600 · Fixed Assets				
1610 · Building - Meeting House (main)	3,852,433	3,852,433	0	
1680 · Organ	513,067	513,067	0	
Total 1600 · Fixed Assets	4,365,500	4,365,500	0	
Total Fixed Assets	4,365,500	4,365,500	0	
TOTAL ASSETS	5,632,989	5,442,090	190,899	

1:47 PM
08/01/22
Accrual Basis

First Parish in Concord
Balance Sheet
As of June 30, 2022

LIABILITIES & EQUITY					
Liabilities					
Current Liabilities					
Accounts Payable					
	2010 · Accounts Payable	3,858	0	3,858	June expenses pd in July
	Total Accounts Payable	3,858	0	3,858	
Credit Cards					
	2012 · Credit Card - Cambridge Trust	9,057	1,592	7,465	June exp pulled back into month to be paid/reconciled in July
	Total Credit Cards	9,057	1,592	7,465	
Other Current Liabilities					
	2025 · Unearned Subscriptions Next FY	353,806	348,054	5,752	More FY23 prepaid pledges
	2026 · Offset Credit Card Fees Next FY	135	124	11	and prepd credit card fees
	2100 · Accrued Payroll	9,176	0	9,176	Pay earned in June moved back into FY22 from July pay date
2140 · Mission Funds					
2150 · Music Funds					
	2170 · Music Reserve	5,380	5,380	0	
	2180 · Music Events	4,363	4,363	0	
	2190 · Organ Fund	13,101	12,901	200	Monthly tr from operations
	Total 2150 · Music Funds	22,844	22,644	200	
2200 · Social Action Funds					
	2235 · AWE - Advocates for Women's Emp	796	796	0	
	2240 · Environmental Team/Green Sanctu	560	560	0	
	2242 · Greening the FP Campus	77,432	75,399	2,033	\$3k donation in from inc stmt Social Action Participation net of LN Consulting (engineers) bill pd
	2245 · Diversity Committee	572	604	(32)	Reimb 2 FP Pride yard signs
	2255 · Racial Justice Action Group	153	153	0	
	2280 · Reclaim Our Democracy	119	239	(120)	ROD web hosting reimb, replaced May 2022 lost check
	2296 · SAC Grants Fund (reserve)	42,210	42,210	0	
	Total 2200 · Social Action Funds	121,842	119,961	1,881	
2400 · RE / Youth Funds					
	2230 · Bird Childrens Fund	190	190	0	
	2430 · Youth Activities Fund	10,421	10,421	0	
	Total 2400 · RE / Youth Funds	10,611	10,611	0	

1:47 PM
08/01/22
Accrual Basis

First Parish in Concord
Balance Sheet
As of June 30, 2022

			2700 · Ministry Funds				
			2710 · First Parish Vision Fund	2,191	2,191	0	
			2740 · Adult Programs	3,105	3,105	0	
			Total 2700 · Ministry Funds	5,296	5,296	0	
			Total 2140 · Mission Funds	160,593	158,512	2,081	
			2800 · Special Programs				
			2820 · Flower Committee Fund	2,169	2,233	(64)	Summer planters
			2825 · The Conchords	1,393	1,568	(175)	Accompanist
			2830 · Retreats	3,775	3,841	(66)	Name tags - Ferry Beach
			2835 · Photo Club Fund	802	802	0	
			2855 · Humanist Council	4,000	4,000	0	
			2894 · PCC U & I Kristoffy Mem'l Fund	685	685	0	
			2896 · PCC Student Sponsorship	2,806	2,806	0	
			2898 · PCC Pilgrimage Assistance	1,893	1,893	0	
			2899 · PCC Val Holt Partnership Fund	1,792	3,511	(1,719)	Kopjafa garden supplies
			2935 · Transcendentalism Council Fund	3,550	3,643	(93)	May speaker honoraria
			Total 2800 · Special Programs	22,865	24,982	(2,117)	
			2950 · Reserve Accounts				
			2965 · Gary Smith Fund Minstrl Interns	27,720	27,720	0	
			2975 · Simmons Restricted Gift	270,000	0	270,000	Into new Fidelity acct #1 for distribution \$90k/yr FY24, FY25, & FY26
			2990 · L-T Facilities Maintenance	75,776	75,276	500	Monthly transfer from annual inc
			Total 2950 · Reserve Accounts	373,496	102,996	270,500	
			Total Other Current Liabilities	920,071	634,668	285,403	
			Total Current Liabilities	932,986	636,260	296,726	
			Total Liabilities	932,986	636,260	296,726	
			Equity				
			3900 · Retained Earnings	406,212	406,212	0	
			3910 · Building / Organ Equity	4,305,503	4,305,503	0	
			Net Income	(11,712)	94,114	(105,826)	FY to date net income
			Total Equity	4,700,003	4,805,829	(105,826)	
			TOTAL LIABILITIES & EQUITY	5,632,989	5,442,089	190,900	

Notes on June 2022 and Fiscal Year 2022 (7/1/21-6/30/22)

Here are the main financial points about FY22...

Fiscal year net income/loss was -\$11,714, \$62,508 better than the -\$74,222 we budgeted (and better than the -\$50,000 I'd feared). We will use much less of our "surplus funds" (left over from previous years) than we anticipated. [FYI – surplus funds are above and distinct from the 10% of annual expenses (\$143,297 this year) that, per governing financial policy, we routinely leave untouched unless there is an emergency.]

Going into this fiscal year, we had surplus funds of \$201,161. Adjusting for this fiscal year's net income and a \$1,753 adjustment to cash reserves for the year, **we will end this year/start next year with surplus funds of \$191,200**. (Please see the Cash Position tab in the attached spreadsheet.)

...and anticipated in FY23

Starting FY23 (July 1, 2022-June 30, 2023) **with \$191,200 in surplus funds**, we will immediately adjust for 1) the FY23 budgeted **planned use of these funds -\$169,986**, and 2) a -\$5,412 adjustment to cash reserves for the year. These funds might be down to **\$15,800 at this time next year. However, our pledges have not come in as budgeted**. For FY23, we currently have \$925,000 in pledges in hand from 310 households (last year we had \$1,078,000 in pledges from 371 households). But we budgeted for \$970,000 in pledges for FY23, a difference of \$55,000, or \$53,350 adjusting for 3% anticipated unpaid pledges. If nothing changes, in *rough* numbers, instead of \$15,800 **at this time next year, we could have "surplus" cash of -\$37,550**.

And our FY23 budget includes \$80,000 income, year 1 of 4, of the Simmons' generous gift (*thank you, Simmons!*).

Neither a budget like this year's nor our projected levels of surplus funds are **sustainable**.

This situation calls us to reevaluate our priorities, our funding, our services, our practices, and our size. Luckily, we have **Rev. Seth Carrier-Ladd, Interim Senior Minister; Heather Packard, Treasurer**, and her colleagues on Standing Committee finance subcommittee, Gib Metcalf and Jim Reynolds, as **leaders**; and the rest of the staff and ***all of you*** to brainstorm and ***implement changes*** aimed at achieving our fiscal, social, and spiritual sustainability. Thank you all, in advance, for engaging in this good and challenging work!

Here are numbers for June I typically report each month.

Monthly current-year *pledge* income was **high-average: \$37,366**, compared to \$21,908 in June 2021 and \$36,887 in June 2020 (average \$29,398).

Monthly expenses were **high: \$164,066**, compared to \$158,500 in June 2021 and \$153,138 in June 2020 (average \$155,819). Average (one twelfth) monthly expenses for FY22 = \$119,414.

Monthly net income/loss was **average: -\$105,828**, compared to -\$117,810 in June 2021 and -\$95,398 in June 2020 (average -\$106,604).

May's Share the Plate recipient was **La Colaborativa**—empowering Latinx immigrants. In June, we mailed **\$2,162** to La Colaborativa. *Thank you all!*

June's Share the Plate recipient is **Out Metrowest**—Building communities where LGBTQ+ youth thrive. We sent **\$1,832** to Out Metrowest for June. *Thank you all!*

In **FY22** some budget lines were overspent, some underspent, but there was nothing glaring that hasn't already been reported here.

Looking ahead:

The **Share the Plate** program **continues its hiatus this month** and will resume in September with Al Otro Lado, a bi-national advocacy and legal aid organization serving migrants, refugees, and deportees on both sides of the US-Mexican border. For a list of the rest of 2022-2023 Share the Plate recipients, please see *FP Weekly*.

Rev. Howard Dana's finished up his work for **First Parish on July 31, 2022**. *We wish him well.*

Interim minister Rev. Seth Carrier-Ladd started work for **First Parish on August 1, 2022**. We're excited to have him here and are keeping ourselves open to many possibilities!

Summer minister Ken Lager will be with us through and preaching his last service on **Sunday, August 14, 2022**. Until then, Ken continues to be available (klager@firstparish.org) during office hours and by appointment for pastoral consults.

In addition to items mentioned above, the **2022-2023 budget** also includes **\$5,000 to begin the search for a new settled minister**, anticipating budgeting an additional \$12,000 in related expenses in FY24.

The **front office** continues to be **open 10:00 am-1:00 pm Tuesday-Friday** for the foreseeable future. The front desk volunteers (including regulars Steve Ruzich, Bev Bringle, Darien, and Sue Dobbie, along with a wonderful cast of substitutes—*thank you!*) are managed by Darien Smith. For the safety, protection, and loving consideration of all in our community, **please remember to wear a mask** when you're in the building. If this policy changes, you will be notified promptly via *FP Weekly*.

Trustees of First Parish Donations

First Parish in Concord Trustees of Parish Donations Annual Report Fiscal Year Ended June 30, 2022

Dear Members and Friends of First Parish,

The Trustees have the following Mission:

The Trustees affirm and support the mission of First Parish to be a welcoming Unitarian Universalist congregation that seeks ways to deepen spiritually, build community, and make a positive difference in the world. In support of that mission over the long term, the Trustees are the stewards of the funds and properties donated to First Parish over more than two centuries.

The Trustees use their best judgment to balance the following objectives for the assets:

- to preserve and build the funds so that they can provide a portion of First Parish's annual operating funds in perpetuity*
- to serve as a reserve fund for extraordinary situations*

In pursuing these objectives, the Trustees work to:

- maximize the return on assets, in light of the need for preservation of capital*
- maintain the properties under our control, and oversee their operation and finances*

In FY 2022 the Trustees carried out this mission as described below:

- Financial Assets:

Legacy Investment Fund Value 6/30/21	\$3,255,310
Legacy Investment Fund Value 6/30/22	\$3,237,912
- Property Assets (10-6 Concord Greene):

Legacy Investment Property Value 6/30/21	\$479,167
Legacy Investment Property Value 6/30/22	\$479,500

Total Legacy Investment Fund Value 6/30/21	\$3,734,477	
Total Legacy Investment Fund Value 6/30/22	\$3,717,412	-0.46%

Net Rental Income	\$1,129
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Support for First Parish	\$143,448
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- Fiscal 2023 Contribution -- For fiscal 2023 the Trustees have determined that it is prudent and appropriate to contribute \$144,341 in support of First Parish. This is a slight increase from the 2022 contribution of \$143,448 based on positive market returns over the past three years and continuing net rental income fluctuations resulting from significant renovation and repair costs.
- Legacy Investment Fund (LIF)
 - The Legacy Investment Fund is comprised of an investment portfolio and a rental property (10-6 Concord Greene). The investment portfolio is managed by Astoria Advisors. Astoria professionally manages the portfolio using a mix of Exchange Traded Funds (ETFs) and Mutual Funds. These index-type funds, taken together, result in an appropriate mix of assets which balances needs for: preservation of capital and investment opportunity; exposure to equity/fixed income, real estate and domestic/global diversification to match the markets; low investment management fees; and compliance with our Socially Responsible Investing guidelines.
 - Performance: For FY 2022, the investment portfolio of the Legacy Investment Fund outperformed its benchmark despite being down for the year as a result of significant market volatility. The LIF was down -9.28% (after fees and withdrawals/additions) versus a benchmark decline of -15.57%. The outperformance was partially due to the effect of having a larger cash position than usual resulting from a significant gift to the LIF in early April. The cash proceeds of the gift are being invested into our asset mix on a 10% per month schedule following a dollar cost averaging approach. The value of the Property Assets were basically unchanged for the year. The ending Legacy Investment Fund Value was down -0.46% year over year.
 - Fees: In FY 2022, the Trustees paid an estimated \$11,089 (0.342% of asset value) in total investment management and administrative fees. This represents a savings of approximately \$20,000 annually that it would cost to work with a traditional “active” investment manager (1.0% of asset value). The savings will have a significant impact on long term performance, compounded over future years.
 - With the help of long-time congregation member and financial adviser, George Gagliardi, the Trustees continue to review the portfolio on a quarterly basis with regard to holdings and performance, with the goal of rebalancing the portfolio once per year.
- Property Management
 - Wright Tavern (in concert with the Wright Tavern Legacy Trust - WTLT)
 - As of the end of August 2022, Wright Tavern will be empty of tenants in preparation for structural repairs in line with WTLT plan
 - WTLT successfully applied to the Community Preservation Committee of Concord for a second round of funding for structural engineering remediation (work to commence in Fall 2022).

- All Properties
 - The Trustees have overseen completion of many deferred maintenance items and planned repairs to the Properties (which include the three Cottage building and the Wright Tavern, but not the Meeting House), including:
 - Insulating the walls and attics of all four buildings
 - Replacing several outdated water heaters
 - Repairing and painting interior walls and ceilings in two buildings
 - Cleaning, sealing, and pouring a concrete floor to cover a dirt floor
 - Updating light fixtures, faucets, and shower heads
 - Repairing or replacing doors and windows
 - Expecting to paint one or more of the buildings in summer 2022 and to update outdated plumbing as well
 - The Trustees are very grateful to Bruce Davidson and the Sextons for all their good work on behalf of the buildings this past year.
- Planned Giving
 - The Legacy Investment Fund received a generous gift of \$510,000 from Ian and Liesel Simmons.
- Coordination with Standing Committee and First Parish
 - Worked closely with the Standing Committee to establish a Memorandum of Understanding, Lease Agreement, and agreement upon terms of the Preservation Restriction with the Wright Tavern Legacy Trust for the future use of the Wright Tavern
 - Continued to participate in the FP Greening the Campus initiative by evaluating the weather tightness of the Cottages, re-glazing windows in one building, and exploring heating alternatives to our current oil furnaces.

Thanks to Heather Packard, Treasurer, Fifi Ball, Director of Operations and Bruce Davidson, Sexton, for there constant help and teamwork and without whom our jobs would have been much more challenging.

Respectfully submitted,

Philip vanderWilden on behalf of the Trustees Laura Bernstein, John Boynton, Roselyn Romberg and Patty Popov

Trustees of Parish Donations -- For FY 2022 -- the Year from July 1, 2021 to June 30, 2022

Schedule 1 -- Gifts and Legacies to the First Parish Legacy Investment Fund -- 1885 to date

	Principal Unrestricted	Principal Restricted	Total
Building Maintenance Fund "for organ and building maintenance"			
2011+ Additions to the Building Maintenance Fund (d)		28,960	28,960
2009 Capital Campaign gifts for the Building Maintenance Fund (a)		5,847	5,847
2005 Gene and Shirley Brown, for building maintenance		20,000	20,000
2000 Legacy of Peter G. Harwood, in Memory of Rev. Dana Greeley & Frederick C. Klinck		100,000	100,000
		154,807	154,807
All Other Funds:			
2022 Gift of Ian & Liesel Simmons	510,000		510,000
2015-22 Gifts of Marion Thompson	6,000		6,000
2021 Gift of Doug & Diana Baker	100		100
2020 Gift of Patrick N. Everett	10,000		10,000
2019 Peter Bulkeley Living Legacy Fund (c)		5,000	5,000
2017 Peter Bulkeley Living Legacy Fund (c)		25,575	25,575
2017 Peter Bulkeley Living Legacy Fund (c)		25,177	25,177
2016 Gift of Margie Stevenson	1,000		1,000
2016 Bequest of Freelon Morris Jr.	10,000		10,000
2016 Bequest of Robert E. Cornwall	2,000		2,000
2013 Bequest of Winifred Campbell	1,800		1,800
2010 Additional gift from the Estate of Eric Parkman Smith		10,000	10,000
2009 Bequest of Eric Parkman Smith		10,120	10,120
2008 Gift of Laura & Mel Bernstein		4,000	4,000
2007 Bequest of Robert Bohn	5,000		5,000
2005 Bequest of Edith Huntington, in memory of her father, The Reverend Loren MacE	2,000		2,000
2004 Gift in Memory of R. & P. Hargreaves	3,000		3,000
2003 Bequest of Louis Bourquin Estate	4,971		4,971
2002 Legacy of Marian Wilmot		5,000	5,000
2001 Legacy of Alice Newell	5,000		5,000
2001 Legacy of Wesley Wilmot		5,000	5,000
1999 Legacy of Olive Buchanan		7,407	7,407
1995 Legacy of F. Gregg Bemis		25,000	25,000
1995 Legacy of Margaret H. Bemis		10,000	10,000
1994 Legacy of Whitney S. Smith		1,000	1,000
1987 Gift of George A. Hill in Memory of Ruth Proal Hill		1,000	1,000
1985 Gift of Mrs. Robert Bowser		25,000	25,000
1985 Legacy of Edith Sellors		1,000	1,000
1984 Gift of Armistead B. Rood in Memory of Prescott Keyes		500	500
1984 Gift of Paul and Sue Minor in Memory of David Minor		400	400
1983 Farnham W. Smith Fund, reinvested interest (b)		32,480	32,480
1983 Farnham W. Smith Fund, in Memory of his grandparents and their descendants (c)		50,000	50,000
1981 Gift of Myron T. Smith in Memory of Justine C. Smith		3,500	3,500
1981 Legacy of Alice Lee, in Faith of Work for World Peace		500	500
1981 Legacy of Helen B. Shaw		5,000	5,000
1981 Legacy of Mary Louise Scott		1,000	1,000
1980 Gift of Elmer Joslin		500	500
1978 Legacy of Edward B. Caiger		1,952	1,952
1978 Legacy of Sarah R. Bartlett		1,000	1,000
1977 Gifts in Memory of Bertha W. Joslin		875	875
1976 Reynolds-Eliot Property - Gift of Abigail Adams Eliot	98,000		98,000
1975 Legacy of Grace Tuttle		1,000	1,000
1974 Legacy of Danforth W. Comins		500	500
1974 Legacy of Mildred E. Davis		2,500	2,500
1973 Legacy of Rosalie Hudspeth	1,000		1,000
1970 Legacy of Anne Bixby Chamberlin		10,000	10,000
1969 The Mite Box (a)		67	67
1967 Legacy of Mary Shepard Barrett Upson		5,000	5,000
1964 Legacy of Edith M. Robb		5,000	5,000
1963 Gift of Eric Parkman Smith in Memory of B. Farnham Smith		2,500	2,500

Trustees of Parish Donations -- For FY 2022 -- the Year from July 1, 2021 to June 30, 2022

Schedule 1 -- Gifts and Legacies to the First Parish Legacy Investment Fund -- 1885 to date

		Principal Unrestricted	Principal Restricted	Total
1963	Gift of Eric Parkman Smith in Memory of B. Farnham Smith		2,500	2,500
1963	Gifts of Mr. and Mrs. Roger C. Fenn		1,983	1,983
1962	Edward Perry Daniels Memorial Fund		368	368
1962	Gifts of Mr. and Mrs. Robert L. Moore		14,250	14,250
1961	Transferred to Holland Fund by Layman's League		125	125
1960	Legacy of Mary A. Barrett in Memory of Elizabeth Lowell Everett	500		500
1957	Legacy of Harriet S. Wheeler		100	100
1956	Henry Francis Smith Fund		17,831	17,831
1954	Gift in Memory of Mary Louise Everett	50		50
1950	Gifts of Mrs. William W. Reed		600	600
1948	Gift of Philip A. Davis		100	100
1946	Legacy of Mark E. Wentworth		1,000	1,000
1946	Legacy of Susanna H. Hubbard		1,000	1,000
1940	Harriet Louise Eaton and Mary Stone Eaton Memorial Fund		1,000	1,000
1939	Gift of Edith Larkin		3,137	3,137
1939	Legacy of Alfred H. Sawyer	1,000		1,000
1934	Legacy of C. Fred Edgerton		3,000	3,000
1934	Legacy of Eliza B. Macquarrie	2,050		2,050
1934	Legacy of Eliza B. Macquarrie, for Music, in memory of Abram and Willietta Hoffecker		410	410
1934	Legacy of William Wheeler	10,000		10,000
1930	Anna M. Holland Fund "for ... purposes approved by Minister ..." (c)		23,500	23,500
1927	Legacy of Leonard Metcalf	500		500
1927	Legacy of Mary A. Beal		4,000	4,000
1927	Legacy of Mary H. Witherle		1,000	1,000
1925	Legacy of Nathan B. Stow (Nathan B. Stow House Fund)		9,350	9,350
1921	Legacy of William P. Milner		500	500
1917	Legacy of Jeanie S. Barrett		1,000	1,000
1915	Legacy of Eliza B. Conant		2,500	2,500
1915	Rev. Hersey B. Goodwin Fund (Legacy of Amelia M. Goodwin)		2,000	2,000
1912	Legacy of Nathan B. Stow		32,354	32,354
1912	Legacy of Nathan B. Stow, for Floral Decorations & Other		500	500
1911	Legacy of George E. Messer in Memory of Mary E. Messer		500	500
1911	Legacy of James Lyman Whitney		50	50
1910	Legacy of Martha R. Hunt		10,000	10,000
1909	Congregational Ministerial Fund "for supply of the pulpit ..." (c)		20,236	20,236
	TOTAL	\$ 673,971	591,753	#####
Real Estate				
1909	White Cottage (part of Congregational Ministerial Fund)		900	900
1904	Thayer & Ball - Gift of Cora Belle Barrett and Devise of Samuel Hoar		2,000	2,000
1885	Wright Tavern - Gift of Ebenezer R. and Caroline D. Hoar and Devise of Reuben N. Rice		3,200	3,200
	Total Historic Value of Real Estate Gifts	\$ -	6,100	6,100

NOTES:

- (a) Where gifts were made over a period of more than one year, the date shown above is the year of the initial gift.
- (b) Donor stipulated that 20% of the annual investment return be added to the permanently restricted principal each year.
- (c) Donor stipulated that investment return be used for a specific purpose.
- (d) Additional building maintenance fund gifts in 2011 through 2019.

Trustees of Parish Donations -- For FY 2022 -- the Year from July 1, 2021 to June 30, 2022

Schedule 2 Detailed Explanation of the Determination of the Annual Contribution to First Parish Operations

	<u>6/30/2019</u>	<u>6/30/2020</u>	<u>6/30/2021</u>	<u>6/30/2022</u>	
Assets:					
Cash, Checking	26,041	47,763	40,683	68,181	
Legacy Investment Fund at market	3,358,145	2,913,957	3,255,310	3,237,912	
Legacy Investment Property at market	-	380,000	479,167	479,500	
FP Campus Real Estate at historic cost	6,100	6,100	6,100	6,100	
Total Assets	3,390,286	3,347,821	3,781,260	3,791,693	
Computation of contribution:					
1 Three year trailing average of investment fund/property	3,276,030	3,333,884	3,477,193	3,596,948	
2 Building Maintenance Fund % of investment fund	5.19%	5.18%	5.16%	4.46%	
Net rental income	39,150	(9,314)	(14,075)	1,129	
3 Three year trailing average of net rental income	25,976	10,093	5,254	(7,420)	
	Fiscal 2019	Fiscal 2020	Fiscal	Fiscal 2022	Fiscal
4 Trustees' judgment of prudent withdrawal rate	4.00%	4.00%	3.75%	4.00%	4.00%
Contribution from Investment Fund	120,878	125,697	122,851	133,355	139,088
Contribution from net rental income	19,705	12,331	25,976	10,093	5,254
Contribution to First Parish Operations	140,583	138,028	148,827	143,448	144,341
Portion of above usable only for maintenance	6,312	6,527	6,376	6,907	7,180

NOTES:

In the first quarter of each calendar year, the Trustees determine the contribution to be made to First Parish operations for following fiscal year. The contribution is based on published financial numbers and has two basic components: one based on a sustainable percentage of the Legacy Investment Fund and the other based on the net income received from renting out the FP buildings managed by the Trustees.

It is generally considered sustainable for a charity to use 3% to 4% of its endowment every year. To smooth out fluctuations due to temporary dips and rises in the stock market, a multi-year trailing average of the market value of the endowment is typically used in calculations.

Each year, the Trustees select a prudent withdrawal rate based on economic conditions (see the boxed number in the row labeled 4). This is then multiplied by a three-year trailing average of the pooled investment fund (the boxed number in the row labeled 1) to determine the contribution from the investment fund. (Note that the numbers in the fourth column are not available at the time the contribution is determined.)

The Trustees maintain and rent out several buildings (see Schedule 4). The basic intention is that all the net rental income from these buildings be contributed to FP operations. Due to occasional vacancies and occasional large maintenance expenses, the net rental income can vary a lot from year to year. To smooth out this fluctuation, a three-year trailing average (see the boxed number in the row labeled 3) is used to determine the contribution to FP.

The total contribution is the sum of the contribution from the investment fund and the contribution from net rental income, with the proviso that the contribution will never be less than \$110,000 nor more than 20% of the FP budget except under extreme emergencies. (Rounding is sometimes applied to obtain a more convenient number.)

Some of the investment fund contribution comes from the Building Maintenance Fund and can only be used for maintenance. The percentage of assets in the Building Maintenance Fund (see the boxed number in the row labeled 2) is used to calculate how much of the contribution is restricted for maintenance.

Lastly, you will note that the Net Rental Income for FY 2022 was \$1,129. As noted in past reports, over the past five years, the Trustees have been catching up on deferred maintenance on many of the properties. This year the Trustees spent \$78,588 on insulation of the rental properties which significantly impacted net rental income. Moving forward, the Trustees anticipate positive cash flow from all rental properties.

Trustees of Parish Donations -- For FY 2022 -- the Year from July 1, 2021 to June 30, 2022

Schedule 3 The Components of the First Parish Pooled Investment Fund

Fund	FY 2021 % of Pool	6/30/2022 Value	Additions to Principal	FY 2022 % of Pool
Unrestricted				
F.W. Smith Fund (b)	6.08%	196,758	594	5.26%
Other	68.98%	2,233,386	512,000	73.20%
Unrestricted Total	75.05%	2,430,143	512,594	78.46%
Restricted				
Holland Fund (c)	12.33%	399,077		10.64%
Congregational Ministerial Fund (d)	5.75%	186,175		4.96%
Building Maintenance Fund (e)	5.16%	167,157		4.46%
Peter Bulkeley Living Legacy Fund (f)	1.71%	55,359		1.48%
Restricted Total	24.95%	807,768	-	21.54%
Total Pooled Investment Fund	100.00%	3,237,912	512,594	100.00%

NOTE:

- (a) The funds were pooled in January 1975 when the funds began to be managed by Welch & Forbes. The computation of percentages above is used to maintain the relative proportion of each fund.
- (b) F.W. Smith fund, requires that 20% of income be added to principal each year.
- (c) Holland Fund, restricted "for such charitable and educational purposes as the Minister and Standing Committee may approve" (per 1930 Annual Report).
- (d) Congregational Ministerial fund, restricted for "supply of the pulpit."
- (e) Building Maintenance, restricted for "organ and building maintenance."
- (f) Peter Bulkeley Living Legacy Fund requires interest/gains be used for TPD's annual support for First Parish

Schedule 4 Income and Expenses From Rental Properties

	Coan House (a)	White Cottage (b)	Thayer & Ball (c)	Wright Tavern (d)	Total
<u>Receipts</u>					
Rental Income	-	18,040	56,400	81,022	155,462
Interest					7
Total income	-	18,040	56,400	81,022	155,469
<u>Payments</u>					
Real Estate Taxes	-	2,226	6,960	9,998	19,184
Insurance	-	615	1,923	2,763	5,301
Repairs & Maintenance	40,325	41,117	22,503	1,680	105,625
Electricity	-		1,258	3,512	4,770
Fuel Oil	-	1,740	4,299	8,242	14,281
Water and Sewer	-	821	799	615	2,235
Rehab & Renovation	-	-	1,412	-	1,412
Bookkeeping					1,200
Miscellaneous	-	-	-	-	332
Other					-
Total Payments	40,325	46,519	39,154	26,810	154,340
Additional expenses					
Capital Improvements					-
Total Costs	40,325	46,519	39,154	26,810	154,340
Net Rental Income	(40,325)	(28,479)	17,246	54,212	1,129

NOTE:

- (a) Coan (1 Church Green) built 1850 purchased 1933 for \$1,500.
As of January 2015, the Trustees approved a request from First Parish to use the space as a parsonage, for housing of the ministerial intern. Since January 1, 2015, no rental income comes from Coan but maintenance and upkeep charges continue to be paid by the Trustees. Because of the parsonage status, the property received a full property tax abatement beginning in FY16.
- (b) White Cottage (7 Church Green) built 1850 purchased 1895 for \$900.
- (c) Thayer & Ball (23 & 25 Church Green) built 1747 given to First Parish 1904 value then \$2,000.
- (d) Wright Tavern built 1747 given to First Parish 1885 value then \$3,200.

Schedule 5 The Investments in the First Parish Legacy Investment Fund as of 6/30/2022¹

<u>Par Value / Shares</u>	<u>Description</u>	<u>Market Value</u>	<u>of Portfoli o</u>				
	<u>CASH AND EQUIVALENTS</u>						
	Cash	475,637	14.7%				
	<i>Total Cash and Cash Equivalents</i>	475,637	14.7%				
	<u>FIXED INCOME FUNDS/ETFs</u>						
12,548	iShares ESG Aware 1 to 5 Yr. USD Corporate Bond	302,281	9.3%				
3,498	iShares ESG Aware US Aggregate Bond	171,192	5.3%				
6,223	iShares ESG Aware US Corporate Bond	144,062	4.4%				
9,602	Spider Bloomberg Investment Grade	289,116	8.9%				
1,802	Vanguard Mortgage Backed Securities	86,154	2.7%				
	<i>Total Fixed Income</i>	992,806	30.7%				
	<u>EQUITIES FUNDS/ETFs</u>						
2,354	Northern Lights Main Sector ROTN ETF	85,615	2.6%				
1,498	Nuveen ESG Mid Cap Growth ETF	51,426	1.6%				
1,760	Nuveen ESG Mid Cap Value ETF	53,909	1.7%				
5,691	SPDR Index MSCI EAFE FS ETF	372,647	11.5%				
1,727	SPDR Index MSCI Emerging Market ETF	105,559	3.3%				
18,420	Oshares US Quality Div ETF	743,247	23.0%				
	<i>Total Equities</i>	1,412,403	43.6%				
	<u>ALTERNATIVES FUNDS/ETFs</u>						
1,623	VanEck Vectors Gold Miner ETF	44,438	1.4%				
1,583	Aberdeen Precious Metals Basket ETF	135,077	4.2%				
8,152	AGFiQ US Market Neutral Anti-Beta Fund ETF	177,551	5.5%				
	<i>Total Fixed Income</i>	357,066	11.0%				
	First Parish Pooled Investment at Astoria Advisors	3,237,912	100%				
	<i>Total Income & Dividends FY 21/22</i>	48,876					
	<i>Administrative Fees & Commissions paid to Folio/Astoria FY 2021/22</i>	11,089					
	<i>Fees as percent of assets</i>	0.342%					
	<u>INVESTMENT PROPERTY</u>						
	Estimated Fair Market Value 7/1/21	479,167					
	Estimated Fair Market Value 6/30/22	479,500					
	<i>Total Annual Fees and Maintenance Expenses</i>	18,449					
	<i>Expenses as percent of property value</i>	3.8%					
	Total Legacy Investment Fund	3,717,412					
Notes: 1- In July of 2020, the Trustees purchased a property at Concord Greene as both an investment and as part of a package to enhance the retirement package of the long time sexton of FP.							