

First Parish in Concord

Annual Report of the
Officers and Committees

For the Year Ending June 30, 2023

Concord, Massachusetts

First Parish in Concord
Annual Report
July 1, 2022, through June 30, 2023

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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 11th day of June 2023 at 11:30 o'clock in the morning, then and there to act and vote upon the following articles, to wit:

1. Approve Annual Meeting minutes from 2022
2. To hear and receive the reports of the Senior Minister, the Standing Committee, the Trustees of Parish Donations, and other committee reports.
3. To choose all Parish officers for the ensuing year.
4. To ratify the UU General Assembly delegate slate.
5. To adopt the First Parish in Concord Covenant
6. To raise money for all parochial purposes, including the Budget for Fiscal Year 2023-2024.
7. To ratify the Senior Minister Search Committee slate.
8. To act upon any other business that may come before the meeting.

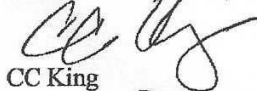

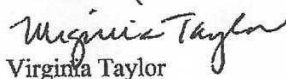
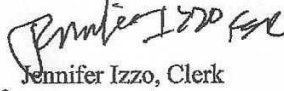
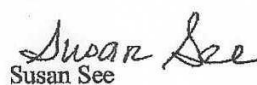
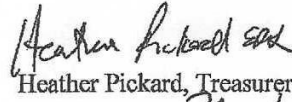
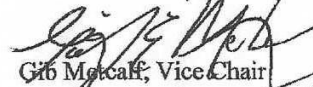
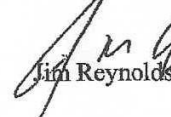
And you are hereby directed to serve this warrant by posting copies thereof, by you attested, in at least two public places in said Town, one of which shall be at the door of the Meeting House of said Parish, eight days, including two Sundays, before said eleventh day of June, and to have this warrant,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

Witness our hands this 9th day of May in the year two thousand twenty-three:

(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
Michael Beer
Caroline Minkin
Virginia Taylor
Jennifer Izzo, Clerk
Jim Hawks
Susan See
Heather Pickard, Treasurer
Gib Metcalf, Vice Chair
Jim Reynolds

Guide to Making, Discussing, Modifying and Voting on Motions

First Parish Annual Meeting

You want to	What to say:	Requires a Motion	Requires a Second	Can be Discussed	Can be Amended	Vote Needed	Notes on the Motion
Make a Motion	"I move that we approve the"	Yes	Yes	Yes	Yes	Majority	Main Motion, starts the motion in action
Amend a motion	"I move to amend this motion by" -- add, delete, modify words	Yes	Yes	Yes	Yes	Majority	Used to modify the Main Motion; can be used to amend an amendment, must use the new words
Withdraw a motion	"I move to withdraw my motion...."	Yes	Yes	Yes	No	Majority	To withdraw a motion or an amendment
Table the motion - refer motion to	"I move to refer this motion to for further consideration"	Yes	Yes	Yes	No	Majority	To stop debate and refer to another group
Postpone the motion to a different time; note when	"I move to postpone the matter until"	Yes	Yes	Yes	No	Majority	To stop debate and postpone the vote to a later point in the meeting or future date
Object to a Procedure	"Point of Order" -- Make statement or question on the process	No	No	No	No	No Vote	To stop debate and challenge the current process; decided by Moderator

Minutes from the Annual Meeting on June 5, 2022

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

Annual Report of the Interim Senior Minister

Rev. Seth Carrier-Ladd

Dear First Parish Community,

What a blessing it has been to have been with you since the start of this church year! I appreciated the warm welcome you offered in August and September, and it has been joyful to get to know you all over the course of the fall and into the winter and spring. Because it can be uncomfortable to think about and enact change, the work of interim ministry is often challenging, and I have appreciated your willingness to engage with it. This year has had the extra layer added in, of course, of navigating our recovery from the pandemic. Like other Unitarian Universalist congregations and religious organizations of all types, we have been figuring out this year how to come back together and how to rebuild and recreate the religious homes that have been so meaningful to so many of us over the years.

The Transition Team has been a huge help with some of the specific tasks of interim ministry that we've needed to address. Much thanks to Doug Hardy, Carol Harris, Mary Ann Barton, Eric Moore, and Mary Rocheleau for all the hard work you've put in to help First Parish navigate this transition period. After a little bit of a delay to start the year due to (what else) Covid impacting some team members, we offered two significant transition events this year, the Rituals of Release and the First Parish Life Story events. The Rituals of Release, held both in-person and virtually in December, offered the congregation the chance to release lingering feelings about Rev. Howard Dana's ministry, which meant grieving his departure for some, and letting go of anger, frustration and disappointment for others. This spring, the in-person First Parish Life Story events gave members and friends of the congregation a chance to reflect together on the important events and stories from First Parish's rich history. Next year, the Transition Team is going to focus their efforts on conversations and dialogue around identity – who are you now as a congregation, and who do you want to be?

The Sunday morning Worship Services this year seemed on the whole to be a success. Average in-person attendance was just under 115, and average attendance on Zoom was just over 50, giving us a healthy 165 weekly attendance average, not including those who couldn't participate on Sunday and watched the services later on our YouTube channel. Our fall services featured Water Communion, All Souls, a hymn sing and more. We added a third Christmas Eve service at 4pm in response to many requests from members, leading us into a strong winter season featuring a staff-led racial justice service and two services led by CB Beal leading into their Saturday workshop with about preemptive radical inclusion. The spring featured our Coming of Age service where our Coming of Age class shared their credos, a collaboration with First Parish in Lincoln for our Holy Week services, and a gorgeous presentation of the Rutter Requiem by the choir at the end of April. All in all, we had a strong year on Sunday mornings featuring a variety of voices and perspectives.

Over the course of the year, the staff and I have also been doing a lot of administrative work, some of it behind the scenes, some of it more visible to the broader congregation. One of the more visible changes was a revamping of FP Weekly, which brought a shorter and hopefully more accessible overall length, as well as weekly themes featuring different areas of church life.

We also brought back a printed order of service after a brief hiatus in the fall, and launched Sunday Announcements, the successor to the former Sunday News, to make sure the congregation had ways of sharing announcements about important events with each other. Some of our behind the scenes work involved streamlining our process for how we help families navigate memorial services, and researching options to find church management software that better suits our needs compared with the software we're currently using. We're hoping to transition to a new church management software platform over the summer, with new features that should make the administrative side of congregational life more accessible for all of us.

One big project that overlaps between administration and worship was our work to upgrade the technology in our sanctuary. Time and again over the course of the year, we experienced instances of our technology in the sanctuary not being adequate for our needs, with some high-profile failures during the service. The staff, led by Beth Norton and Paul Langston-Daley, spend a good portion of the year identifying our specific needs, interviewing system designers and contractors, and researching what products would meet our requirements. This spring we selected Shanahan Sound & Electronics to design and install our new system and signed a contract with them to install our new system in later summer/early fall. A targeted fundraising campaign raised the money to cover the costs of the new system – much thanks and incredible gratitude to the generous givers who helped make this possible.

There is of course a huge amount of other things that happened in church life that will be covered in other reports – the creation of a congregational covenant, so many wonderful religious education programs, lots of social just work, and more. Please read all the other reports to get a sense of the breadth and scope of church work this year – we've done a lot! You, the members and friends of First Parish in Concord, you should be proud of yourselves. You've accomplished an amazing amount, and, more importantly, you have taken significant steps forward in rebuilding a community that was taxed and stressed by the challenges of the pandemic. It has been an honor and a privilege to serve as your Interim Senior Minister this year. I look forward to our work together next year as you go through the process of calling your next Settled Senior Minister. With gratitude and appreciation for all of you and your gifts, I submit to you this my annual report for the 2022-2023 church year.

peace, love, and blessings,

Rev. Seth Carrier-Ladd
Interim Senior Minister

Slate of Officers

FIRST PARISH IN CONCORD

2023 Nomination of Officers of the Parish; Members of the STANDING COMMITTEE.

- 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 2023-24.
- Members will be asked to vote on the slate at the Annual Meeting on June 11, 2023.
- Respectfully submitted by the Nominating Committee of Leanne Baxter, Jeff Brainerd, Lora Brown, Kristin Haddad, Mark Russell Prior, Darien Smith and Susie Weaver.

Lisa Bennett / *Member at Large (First 3-year term)*



Lisa Bennett has been attending First Parish with her family since 2014 and has been a member since shortly thereafter. She is a member of the First Parish Choir and taught RE classes for several years. In addition, she was a “Face of the Campaign” for the Annual Pledge Campaign providing input to the APC committee and a testimonial. Lisa has been an educator for over 30 years working in a variety of schools as a teacher, teacher trainer, school leader, mentor, and advocate for students with disabilities. Through these roles she also has experience in project management and DEI. Lisa lives in Acton with her husband, Phil, daughter, Elena, and cat, Theo.

Jim Reynolds | *Member At Large (Second 3-year term)*



Jim Reynolds has attended First Parish since 1997. Both his children were raised in this church. Jim has been heavily involved in Social Action, Religious Education, and the church’s Music Program. As part of our SAC program, he led a strong relationship with Common Cathedral for several years. Combining both SAC and RE interests, he led two youth service trips to El Salvador. He has also taught at all RE levels, including OWL and mentoring Coming of Age. One Ferry Beach weekend, he wandered into a Rise Up Singing session and has been an enthusiastic participant in RUS, Choir, and Contemporary Vocal Ensemble since that time. Jim is Executive Director and majority owner at Sameem Care, an outpatient substance abuse and behavioral health practice based in Newton.



Virginia Taylor | *Member At Large (Second 3-year term)*

Virginia Taylor came to New England and to First Parish after moving from Atlanta in the early 2000's with her husband Bill and their two young daughters. For several years she was active in the RE program. More recently, she has come to appreciate the intergenerational community that First Parish offers to us all. Virginia served as coordinator of the First Tuesday Group for 5 years. For the last 8 years, she has been part of the Pastoral Care Team as a pastoral care lay minister. She also served on the Pastoral Care Council, a pledge team, and an advisory ministerial search committee. A favorite current activity at First Parish is leading memoir writing workshops. Outside church she coaches high school and college students in reading and writing skills. As their daughters are now launched, Virginia and her husband live in Acton with their dog and two cats.



Jen Izzo | *Clerk (Third 1-year term)*

Jennifer Izzo has attended First Parish for almost 20 years. She taught RE classes, attended Ferry Beach and served on a variety of committees, including the Nominating Committee, Advocates for Women Empowerment and Sounding Board. She helped with 3 fundraising auctions for the church. She also organized several programs for the church community, including a Wellness Program for Women, yoga classes for FP moms, buses to the Women's March in Washington D.C., and a Mother-Son Cooking class. Outside of church, Jennifer and her husband, Pete, are parents to 3 boys. She is an in-house attorney at a medical device manufacturer.



Leah Russell | *Treasurer (First 1-year term)*

Leah Russell has been coming to First Parish since 2015. She has served on the RE Council, the Interim Minister Search Committee, and the Covenant Committee. Leah has also helped organize events for the Mom's Connection Group. Additionally, she has enjoyed going to Ferry Beach with her son, Finch, and participating in the at-home Women's Retreat. Born and raised in the Winchester Unitarian Church, she deeply values her UU roots and hopes to continue to do meaningful work to contribute to First Parish and its community. She works for a made-to-order footwear company dedicated to the mission of improving the lives of Guatemalan cobblers through equitable pay. She also runs a 501(c)(3) nonprofit for families of children adopted from Kazakhstan.

Tom Wilson / Moderator (Second 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 renewal 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

NOMINATING COMMITTEE

Slate of officers to be determined.

TRUSTEES OF PARISH DONATIONS

Slate of officers to be determined.

**General Assembly 2023 Delegates
June 21-25, 2023**

To ratify the UU General Assembly delegate slate:

Motion by Liz Rust

Lillian Anderson
Sara Ballard
Stoney Ballard
Jan Power
Liz Rust
Susan See
Darien Smith
Cindy Soule
Lois Suarez

First Parish in Concord Covenant
Draft for vote at Annual Meeting, June 11, 2023

As Unitarian Universalists, we are called by Love and by our vision of Beloved Community to live out our highest values. As a congregation with spirituality at our core and spokes that connect us to our wider world, we pledge ourselves in Covenant so that our relationships and our community can thrive.

We covenant to live out our mission together.

We nurture belonging across the generations.

We support each other on our spiritual journeys.

We greet one another with curiosity, kindness, respect, and openness. In the belief that we can make progress together, we show up with energy, joy, and commitment to our shared values.

Honoring our diversity and centering justice, we strive to be open and intentionally welcoming. We are willing to be changed by being in community and by our world.

We respect the sanctity of our spiritual community. When in conflict, we talk with each other, not about each other. We listen without judgment, seeking understanding and acceptance.

Trusting in forgiveness and reconciliation when mistakes are made, we strive to be brave and risk vulnerability.

We seek goodness while we do not expect perfection.

As a community of members, friends, ministers, and staff, we cultivate a culture of appreciation for one another. We value expressing gratitude freely.

Budget Information Session



Budget Information Session

Heather Packard, Treasurer
Standing Committee Financial Sustainability Subcommittee

Agenda



- Understanding First Parish's Budget Process
- Annual Pledge Campaign Round-Up
- Context for the Proposed Budget
- Next Year's Budget
- Budget and Budget Process Questions?

First Parish Budget Process

Budget Process



- Staff prepares a draft budget for Standing Committee
 - “The budget should reflect the priorities of the Congregation, staff, and Standing Committee. The projections for income and expenses should reflect a prudent approach to our financial conditions.” (Finance Policies, 2018)
- Budget information and listening sessions held with congregation during budget preparation.
- Standing Committee reviews and recommends a budget for approval by members at the June Annual Meeting
- Standing Committee members and staff hold informational sessions about the proposed budget prior to the Annual Meeting
- Members approve a budget at the Annual Meeting

Annual Pledge Campaign Results

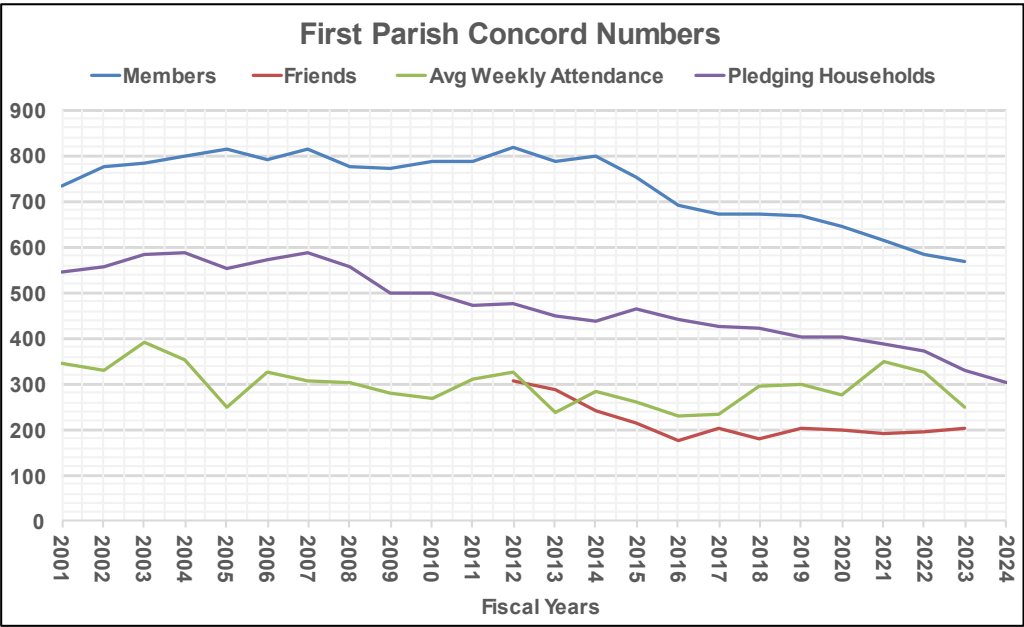
Annual Campaign Results



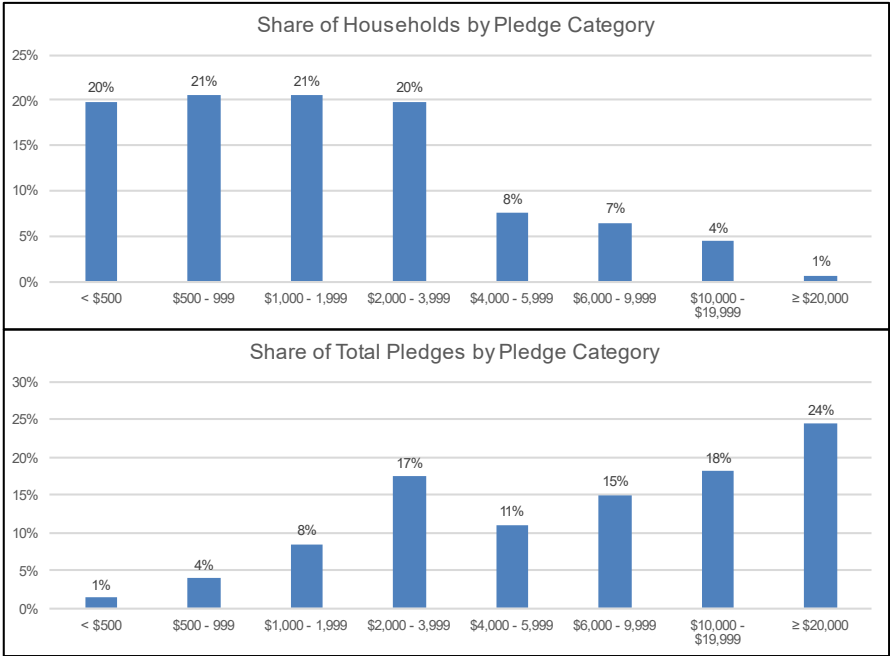
Pledge Commitments Timing	Fiscal Year (July – Jun)	Stewardship Campaign Goal	Pledges Received (to date)	Households Pledged (to date)	Median Pledge
Spring 2021	FY2022	\$1,080,000	\$1,078,268	371	\$1,150
Spring 2022	FY2023	\$970,000	\$971,123	328	\$1,150
Spring 2023	FY2024	\$1,025,000	\$923,810	301	\$1,000
Difference - FY23 to FY24		\$55,000	-\$47,313	-27	-\$150
Difference % - FY23 to FY24		5.7%	-7.55%	-18.3%	4.3%

Average pledge FY23: \$3,025 per household FY24: \$3,069 per household
 Cost to run First Parish: \$3,180 per year per Active household (467) based on FY23

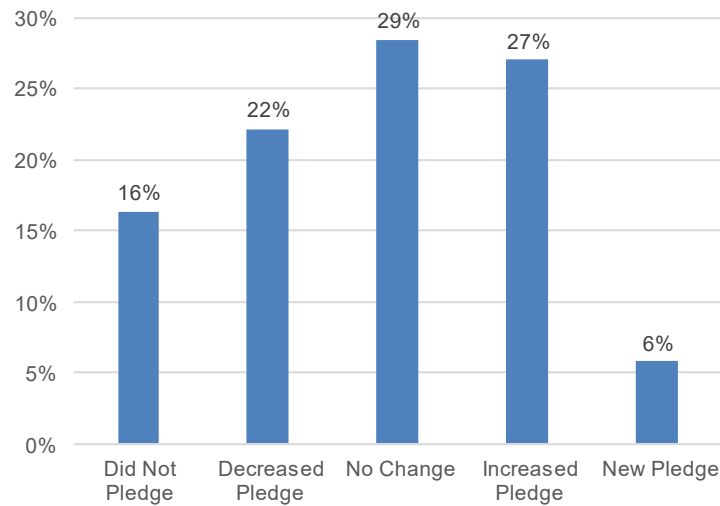
Members, Friends, Pledgers, and Attendees



Annual Campaign Results – Pledge Breakdown



Comparison of FY23 Pledging to FY24*



* Percent of total households that pledged either last year and/or this year, by pledging category

9

Annual Campaign Team

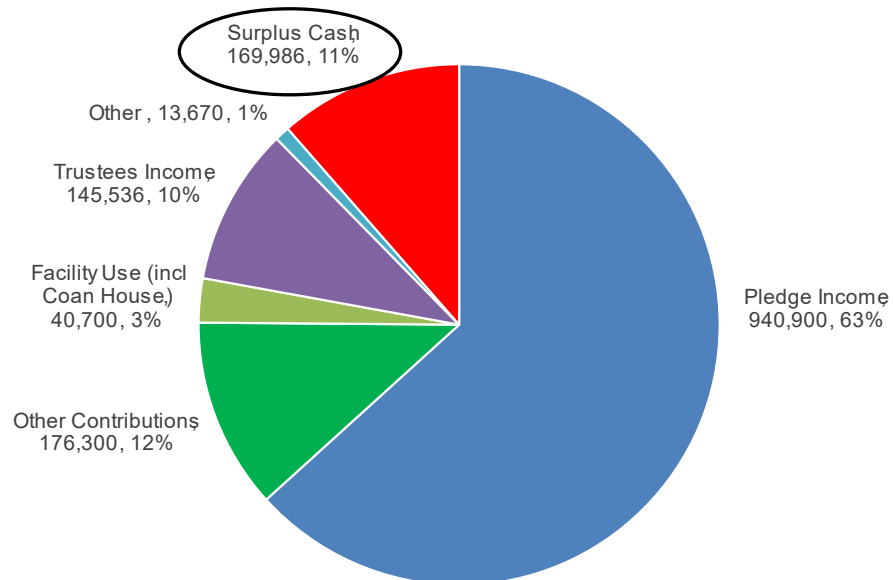


Role	Volunteer(s)
Project Manager	Alane Wallis
Communications	Heather Packard
Steward Captains	Irl Smith, Dave Ellwood, Sara Ballard, & Phil D'Amico
Scribe	Irl Smith
Online Pledge Tracking	Darien Smith
Thank You Notes	Pledge Team
Sustaining Donor Event	Alane Wallis
Testimonials	Eric Moore, Jen Izzo, Peter Lowitt, and Meg Packard
Testimonial Coordination	Alane Wallis
Graphic Design	Tim Whitney
Staff	Seth Carrier-Ladd and Fifi Ball

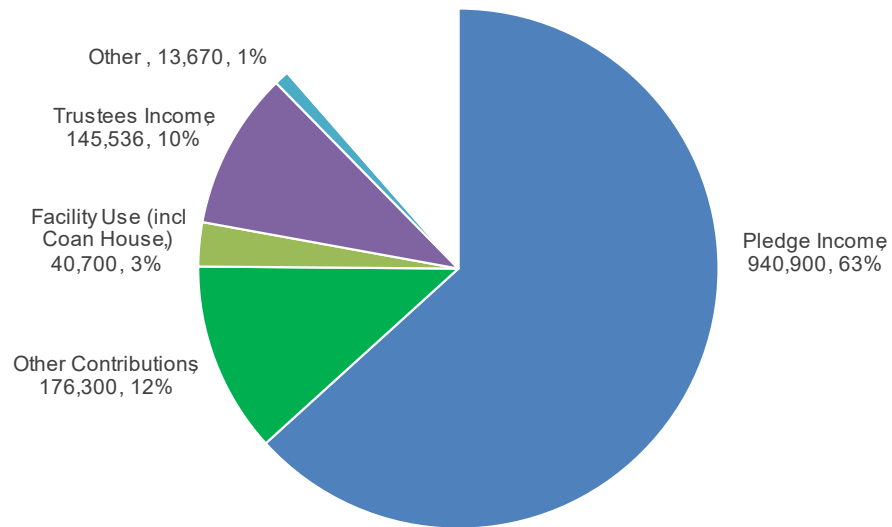
thank you!

Our Current Budget Was Challenging (July 2022 – June 2023)

Where Our Money Comes From



Next Budget: No Surplus Funds!



Next Year's Budget
(July 2023 – June 2024)

FY24 Budget Summary- Income



Description	FY23 Budget	FY24 Budget	Difference	% Total Income (FY24)
Pledge Income (97% pledges)	940,900	896,096	-44,804	64%
Trustees Income	145,536	137,658	-7,878	10%
Investment Fund Contribution	NA	120,000	120,000	9%
Large gift	80,000	80,000	0	6%
Other Contribution Income*	51,300	43,600	-7,700	3%
Miscellaneous Other Income**	13,670	75,100	61,430	5%
Rent/fees – Coan, Milldam, other	40,700	40,000	-700	3%
Total Income	1,272,106	1,392,454	120,348	100%

*Plate/Box, Gifts, PriorYear Pledge Payments, Credit Card Fees Contributed, no SAC pass-throughs included (\$45k; \$43k)

**SRECs, Interest Income, Special Events, Misc.

FY24 Budget Summary- Expense



Description	FY23 Budget	FY24 Budget	Difference	% of Total (FY24)
Ministers– Senior, Summer, & Guest (incl techs)*	204,449	169,925	-34,524	12%
Property, Plant, & Equipment (less techs)	237,728	254,728	17,000	18%
Human Resources Benefits & Taxes***	199,046	186,819	-12,227	14%
Administration, incl Search \$17k, Audit \$5k	223,517	215,345	-8,172	16%
Music	161,905	151,501	-10,404	11%
Religious Education	160,045	157,263	-2,782	11%
Social Action (without pass-throughs \$43k)	67,935	67,935	0	5%
Pastoral Care**	100,381	100,882	501	7%
Denominational Support (UUA, PCC, GA)	75,786	79,132	3,346	6%
Congregational/Membership****	8,800	4,700	-4,100	0.3%
Fundraising	2,500	1,700	-800	0.1%
Total Expense (not including pass -throughs)	1,442,092	1,389,930	-52,162	100%

*Sr min inclfica, sr min/prof exp, summer min, guest mins, min moving, Sunday techs

**Pc min inclfica, pc min/prof exp, pc budg

***Benefits section + shared/prof dev, no min fica (3 people)

****Aesthetics, Coffee Hr, Sustain memb, New memb-Cong Life

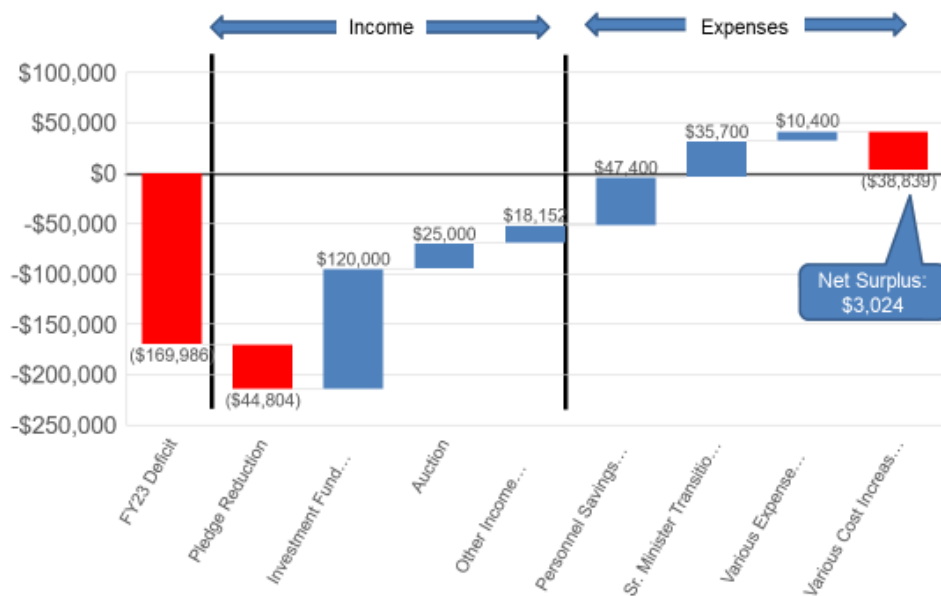
Eliminating the Deficit



	FY23 Deficit	-\$169,986
	Pledge Reduction	-\$44,804
	Investment Fund Contribution	\$120,000
	Auction	\$25,000
	Other Income Changes	\$18,152
	Personnel Savings (Church Admin., Children's Choir Director)	\$47,400
	Sr. Minister Transition (Moving, Search, Benefits)	\$35,700
	Various Expense Savings (Facilities Repair, RE, Cong. Life, etc.)	\$10,400
	Various Cost Increases (Building Maintenance, UUA Annual Fund, Plant Operations, Audit)	-\$38,839
	FY24 Net Surplus	\$3,024

Note: Pass-throughs are excluded from this table.

Eliminating the Deficit



Our Budget Challenges



- Expenses are up but pledges are not
- Attendance is down
- No surplus funds to fill in the hole between revenue and spending (\$170,000 hole to fill)
- Trustees adding \$120,000 from the investment fund for next year's annual budget
- Some belt tightening in next year's budget but nothing dramatic
 - Benefitting from some unanticipated savings as well
- Pandemic down but not out

Future Budget Challenges



- Non-pledge revenue scheduled to decline:
 - Trustees transferring an additional \$120,000 from the investment fund to next year's budget and \$60,000 the following year

\$170,000 Budget Deficit		
FY '24 \$50,000 Shortfall	FY '25 \$60,000 Shortfall	FY '26 \$60,000 Shortfall

- We cannot rely on surplus funds in this or future budgets
- Overly dependent on very large pledges from a few key donors
 - Quarter of pledge income comes from 1 percent of pledging households
- We will either need new revenue sources or spending reductions
- We have time to plan for this, but we cannot put it off

Questions?



Don't tell me what
you value, show me
your budget, and
I'll tell you what
you value.

Joe Biden

meetville.com

Search Committee for the Senior Minister

The Standing Committee is pleased to present the following slate of members for the SEARCH COMMITTEE FOR THE SENIOR MINISTER.

Sara Ballard

Sara and her husband, Stoney, and have been attending First Parish since 1989 and have been very involved ever since. They have been members of the choir for twenty-three years. When their children were young, she taught R.E. for many years, and later twice served as a mentor in the Coming-of-Age program. She has been on a number of committees and councils, including the R.E. Committee, Music Director Search Committee, Worship Associates, Standing Committee (two terms), Music Committee (Chair), Diversity Committee (Chair), Partner Church Committee, Women's Retreat Committee, Ferry Beach Committee, Arts Council, and Congregational Life Committee. Having attended nine General Assemblies as a delegate from First Parish, she will attend her tenth this June in Pittsburgh. She has been involved with First Parish in many capacities over the years; some of her favorite memories are of participating in the various musicals, plays, and variety shows performed here.



Jeff Clanon

Jeff and his family joined First Parish in the fall of 1993. His initial involvement was with Religious Education where Jeff and his wife Regina taught classes for a number of years. In the early 2000's Jeff was asked to participate in a Strategic Planning Committee which resulted in what was at the time the first formal strategic plan for the Church. Shortly thereafter Jeff served on the Standing Committee for several years and was the Chair during the Churches ministerial transition from Gary Smith to Howard Dana. Since 2015 Jeff has organized a dozen Retreats for First Parish Men with Howard Dana and currently with Paul Langston -Daley. He is also a facilitator for the Small Group Minister Program and serves on the Congregation Life Committee.



Kristin Haddad

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 involved in many ways, including service on the Standing Committee, as a pledge campaign steward and 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.



Peter Lowitt

Peter Lowitt was the Director/Land Use Administrator for the Devens Enterprise Commission, the agency charged with permitting the redevelopment of the former Fort Devens army base in Massachusetts. At Devens, Mr. Lowitt focused on the sustainable redevelopment of the 4400-acre former army base. In this capacity, he promoted eco-industrial networking and Devens as an Eco-Industrial Park as part of a holistic approach to greening Devens. Prior to coming to Devens, Mr. Lowitt served as Director of Planning and Economic Development for the Town of Londonderry, New Hampshire (1993-1999) where he created the Londonderry Ecological Industrial Park and the award-winning Sustainable Londonderry Program. He serves as chair of the Greening the Campus Task Force at First Parish and has served as past chair of the Environmental Team at FPC. He is a lifelong UU.



Kristin Moore

Kristin Moore has been a member of First Parish for over 18 years. Her involvement includes leading the Coming of Age program for four years and serving as Moderator for the Annual Meeting for five years. In addition, she sings in the choir and helps organize the annual Children's Holiday Craft Workshop. She works at The MathWorks as a program manager for software development. She lives in West Concord with her husband, Eric, daughter Ava, and Sonja the dog.



Eric Van Loon

Eric and his wife Laurie, 30-year members whose sons participated in RE/AYS/COA, have institutional memory with Dana, Gary, Jenny, Howard, and three interims. Eric chaired the Standing Committee, defending our FP AYS program during a bogus 1997 national TV attack, co-founded the Jericho Road Project, served on the Greeley Foundation Board, headed SAC Grants, and participated in an FP Navajo Nation youth service trip. He also sang in the Transylvania pilgrimage choir and in musicals (Grub Street, High School), and won the auction bid to conduct the FP Hallelujah Chorus. A professional mediator/ arbitrator for 30 years (environment, government, business, tribal matters), he previously worked as a litigator (Boston busing, offshore oil), state official (two Dukakis administrations), nonprofit head (Union of Concerned Scientists, and six-term Concord Town Moderator.



Lora Venesy

Lora Venesy grew up in a UCC/Presbyterian church in a suburb of Philadelphia. She & her family came to FP shortly after moving to Concord in 2005. She quickly became involved as an OWL teacher and has since worked on the RE Council (Chair), Social Action Committee, Advocates for Women's Empowerment (Co-chair), and the Standing Committee. As part of her tenure on the Standing Committee, she co-led a year-long process, "Year of Reflection and Visioning," that included a comprehensive dive into church life with workshops, a survey, discussions and a congregational retreat. Prior to that, she was involved on the DRE search committee. She has served on several community boards and currently works for the non-profit Dignity Matters and as Director of Religious Exploration at First Parish in Lincoln. Lora holds a BA in Fine Arts and Psychology from Ohio Wesleyan University and lives in Concord with her husband and 2 daughters. She can be seen working at the polls during elections or walking the trails with her dogs.



Greening the Campus Task Force

1

Greening the Campus Task Force Update 2023

Charged to collaborate with the Trustees and Wright Tavern Task Force to implement the FP Annual meeting vote to get FP off fossil fuels.

- The **Sanctuary is now insulated** to modern standards.
- **Blower door InfraRed test now** identifies remaining building efficiency flaws...
- **Energy efficient lighting** has been installed throughout the church
- **The Trustees are insulating** all four of the cottages (R-13 walls R-32 ceiling)
- Field Trip to **Middlesex School** reviewed **6yo Geothermal Music Complex HVAC** for cost, capability, operations and satisfaction **couldn't be happier**
- **The Trustees are replacing leaking cottage windows**
- **Drilled a Geothermal test well that confirms excess heating capacity** letting us consider **campus-wide heating and cooling** (Wright Tavern and cottages)
- 54 removable friction **interior storm window inserts** have been purchased and installed to **remediate our legacy leaking windows**
- **Identified direct 30% incentive** for the proposed Geothermal design
- The Task force has raised **\$162,000 in private donations** to cover our work to date.
- **Wright Tavern Legacy Trust and Trustees of Parish Donations** voted to support the Greening the Campus effort and to participate to the extent feasible.



5/31/2023

Prepared by Peter Lowitt, Greening the Campus Task Force Chair

2

Greening the Campus Task Force Update-2023

- The Trustees are insulating all four of the Cottages (R-13 walls & R-32 ceilings). Three of the four are completed, 23 Thayer is scheduled for this summer.
- The Trustees are replacing leaky cottage windows. One cottage is done, a second is scheduled for this summer.
- During structural renovations Wright Tavern will include insulation and other energy saving options. They hope to include connecting to the campus geothermal system. As a 501C3, the Wright Tavern Legacy Trust has agreed to look for grants to assist with our Greening the Campus efforts.
- The 250 anniversary of the American Revolution (REV 250) can help us position FPC as a leader in the renewable energy revolution and serve as a pilot for other nonprofits seeking to get off fossil fuels.



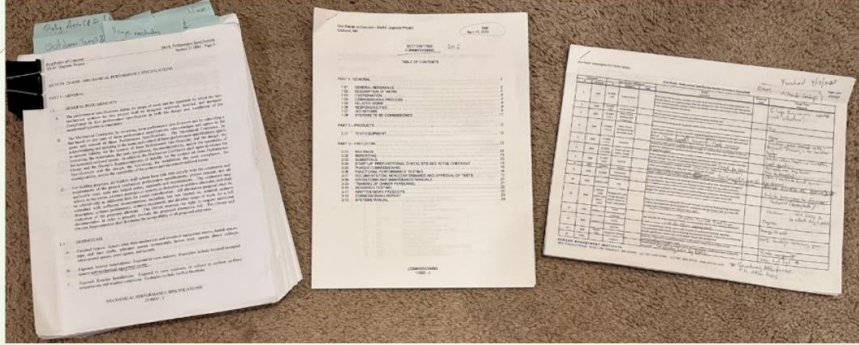
Prepared by Peter Lowitt, Greening the Campus Task Force Chair

5/31/2023

3

Greening the Campus Task Force Update 2023

- We contracted **LN Consulting**, a Vermont, firm to design a Geothermal HVAC system to get us off fossil fuels. This permits FP to solicit project bids.
- Retained **Nashawtuc Architects** to resolve Historic District Commission issues
- Engaged a commissioning agent, DMI, to be responsible to assure that installed systems are tested to work as designed. **DMI has reviewed the LN design specification** to assure the committee of its technical soundness



LN Consulting Design Spec.
March 18th, 390 pages

DMI Commissioning Spec.
Review April 3rd, 23 pages

Joint FPGSTF Joint Review
April 13th, 55 Spec, drilldowns

5/31/2023

Prepared by Peter Lowitt, Greening the Campus Task Force Chair

4

Estimated fuel savings from conservation efforts

- During Covid the building was shut down, the windows were open during service and the situation did not generate data that easily translates into projected energy savings.
- The facility does use about 7000 gallons of oil per year for hot water and heating.
- We have insulated the sanctuary walls and can estimate the benefits of interior storm window inserts as well.
- Sanctuary walls went from R-1 to R-26, blower door test and UV imaging identified some areas of leakage to be addressed.
- Sanctuary ceiling went from about R-35 to R-70. There are air leakage issues still to be corrected, probably from penetrations at light fixtures, etc.
- Exploring adding more solar to chapel roof
- Coordinating with Concord Municipal Light Plant

Prepared by Peter Lowitt, Greening the Campus Task Force Chair

5/31/2023

Thanks to our volunteers & next Steps

- Kel Keleher, Irl Smith, Dave Quimby, Greg Stewart, Barry Copp, Jim Snyder-Grant, Regina Corrao, Jim Flavin, Brad Hubbard-Nelson, Michael McAteer, Peter Lowitt, Bruce Davidson, Rick Moore, Ted Bayne and apologies to anyone we might have missed
- The task force will send the specifications out to bid over the summer.
- The task force, in furtherance of its charge, will bring the bid information to the congregation.
- *We are exploring hiring a construction manager and owner's project manager.*



Prepared by Peter Lowitt, Greening the Campus Task Force Chair

5/31/2023

Exploring phasing of our project in order to better manage costs

- Building envelop upgrades to remedy leaky areas and insulation gaps
- Geothermal System drilling and testing stubbed into mechanical room
- Rooftop or attic unit and Sanctuary HVAC Upgrades. Provide central control system.
- Remove boiler and provide water to water heat pump off geothermal for all heating hot water.
- Parish Hall, chapel, and other space in main building HVAC upgrades.
- Satellite buildings (Cottages and Tavern) as funding and opportunities present themselves
- Replace gas stove with electric induction oven

Prepared by Peter Lowitt, Greening the Campus Task Force Chair

5/31/2023

Annual Report of the Minister for Pastoral Care

Rev. Liz Weber

This year felt like there was some settling into a new rhythm. It was our second year being open in person after the height of the pandemic. Integrating our online and physical connections with each other has become a norm. At the same time, this first year of interim ministry brought its own different rhythm. We've continued to ride the waves of change. Reflection on our history, identity, and future have been timely both in the interim period and as we began to shift into an endemic phase of COVID-19.

This year also brought a formal shift in my role. Hired in 2019 as the Minister for Pastoral Care, my title was officially changed this fall to be the Minister for Congregational Care. This change reflects the ways in which I have grown and expanded this ministry since it became a fulltime position upon my arrival.

As well as continuing to focus on direct pastoral care and the pastoral care ministries of the church and to co-lead worship on Sundays, I also focus on congregational life. This includes supporting our varied small groups and working with relevant committees on both our church culture and our programming. Two major successes this year were revamping the Small Group Ministry program and developing our congregational covenant.

After a few years' hiatus, we relaunched Small Group Ministry with over 10 leaders and over 50 participants. Small groups met twice monthly for the bulk of the church year using session plans matched with our monthly worship theme. Participants and facilitators alike said they experienced strong connections within the groups and spiritual growth in themselves. The planning team included myself, Lilian Anderson, Chuck McDonald, and Roselyn Romberg.

As a covenantal faith community, we realized this year that we should develop a covenant for our congregation as a whole. We kicked off the process with a congregational retreat in February comprising worship, small group sharing, and discussion of what we needed and offer one another as a community. The Covenant Team then distilled notes on those needs and offers from over 100 retreat participants into a draft covenant. Through workshops, town halls, and visits to church committees, we continued to revise the covenant so that a final draft is ready to present for affirmation at annual meeting. Covenant Team members include myself and CC King as co-convenors, Tracey Hurd, Ken Reeves, Leah Russell, Susan See, and Dana Snyder-Grant.

Our regular 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, 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.

This year's new member class was a success, following on the good work we'd done last year to re-launch the program. Lillian Anderson, Liz Rust, Susan See, and I continued as the planning team. About 15 new members signed the book this year.

Last 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), Beth Norton (staff rep), and myself (convener and staff rep). I am grateful for the thoughtful and caring work of this team.

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

Lori Gill-Pazaris revamped our Meals program for parishioners experiencing surgery, illness, or bereavement. She organized a loose team of volunteers to cook for their fellow parishioners and has also helped people to set up MealTrains as needed. I am heartened by the shift to meals by parishioners for parishioners as a sign of community care.

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.

Our Prayer Shawl Knitters and New Baby Welcomer continued to be of service, as did our pastoral choir the By Your Side Singers (under the direction of Beth Norton). Each of these groups brings beauty and peace to people in a time of need.

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, Ellen Whitney, and myself, with funding from the Women's Parish Association and individual donors.

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, and myself.

The Pastoral Care Library remains available and in good shape. Enid Boasberg officially completed her service as its steward early this year. I am deeply grateful for her years of care.

Overall, this has been another year of change, even as we have continued to strengthen our connections as a spiritual community. I'm grateful to be serving this congregation and grateful to be working alongside Rev. Seth Carrier-Ladd, our staff team, and our lay leaders.

Music Ministry Annual Report
Elizabeth Norton
Director of Music and Arts Ministry

As expected, this first year of Interim Ministry has witnessed many changes to our congregation and the music ministry. And navigating the gradually shifting environment around COVID precautions was a theme all year. When I contracted COVID in early December, the spiritual challenge of Advent waiting and expectation took on a whole new dimension! I am grateful to the choir and to our excellent music staff for their support during that time and for their willingness to fill in where necessary.

Our Choirs continued to meet in person, masked for most of the year. We paid attention to ventilation, distance and time in our rehearsals and services, gradually easing precautions as the COVID numbers in our area declined and stayed low. In late May, our Adult Choir decided to go mask optional just as we moved to optional masking during worship.

Despite the considerable challenge of singing while masked, the First Parish Choir remained strong, with 46 active members and 25-30 singing on most Sunday mornings. For the first time, the choir of First Parish in Lincoln joined us to sing for our joint Maundy Thursday service. The highlight of our year was singing John Rutter's exquisite *Requiem* in April. We had begun to learn the piece in 2020 and had to lay it aside until we could sing together again. Using the *Requiem* as the framework for the morning worship service, we held space to acknowledge our individual and communal loss in the past three years and to recognize the resilience of those who survive trauma. Judging from congregational response, the service was received in the spirit we intended. It felt like a kind of closure to this COVID crisis.

Anderson Manuel, pianist Jennifer (Minjing) Vandenbos and the Gospel Ensemble gathered faithfully after services each Sunday to rehearse and enjoy the unique musical and social community they have created together. The group brought spirited music and leadership to six services this year, including Christmas Eve and the Coming of Age service. Special thanks to Rick Moore for providing the sound system support for this group.

Brendan Ferrari continued to lead our Children's Choir program with a positive attitude and a willingness to experiment. The program for grades 5-6 is in a time of rebuilding. The choirs combined for a multi-generational offering on November 20 for the first time in two years and a small but mighty Children's Choir group sang for the "Pick up Pageant" in December. When attendance dropped off in the winter, Brendan consulted with families to change the rehearsal time to before the service, though this did not significantly improve attendance. We kept experimenting by introducing a "family choir" model at the end of the year. Brendan also collaborated with Amy Freedman and Dawn Van Patten to bring music into RE spaces as much as possible. Throughout his 3 years with us, Brendan has brought enthusiasm, expertise and flexibility to a position that continued to change with the evolving COVID environment. He decided mid-year that this would be his last year at First Parish. We deeply appreciate all that he brought to us during this challenging time and wish him the very best!

As COVID precautions lifted, the By Your Side singers, our pastoral choir were thrilled to return to “live” sings with parishioners we had been visiting on Zoom. We added regular “social” sings at Concord Park and Care One to our schedule, reaching parishioners and other residents in these facilities. We added some new parishioners to the list of “regulars” that we sing to each month and sang for several members who were recovering from surgery or illness. As has long been true, I appreciated the partnership of Dana Snyder-Grant in leading this group, and delight in the increased initiative taken by group members in “navigating” and “anchoring” our sings.

Our Parish Organist, Eric Huenneke, continued to play services on a regular basis and provide music for memorial services. In this transitional year, we tweaked our liturgy fairly regularly and Eric did his best to adapt to evolving expectations of keyboard repertoire, both in style and in length. His stewardship of our beautiful organ in partnership with builder and technician Steve Russell is invaluable. For a second year, Eric elected to take his two months off in January and February (he has been serving through the summer months). David Owens filled in ably on keyboard during those winter months.

Rise Up Singing, our monthly folk-song circle continued to gather in person, starting the year, as the weather allowed, outdoors on the Keresztúr patio. As it got colder, we moved inside to the Sanctuary, where, with the increased ventilation provided by strategically placed fans, we sang masked. As the year progressed and the building got busier, we moved to different locations, including the Chapel and the Parish Hall. Perhaps during the summer months, we will move outdoors again. A large proportion of those who faithfully attend Rise Up Singing are folks who found the group through connections to the Boston area folk music world. This group continues to be a way we connect meaningfully with the wider community. I am thankful to Lauren Evans, who maintains the email list for those participants in the greater Boston area.

These special musical events signaled our continuing emergence from pandemic isolation and are worth celebrating: Emma’s Revolution gave a concert in our Sanctuary in October. This was a “seize the day” musical collaboration with UU The Vote and Reclaim our Democracy. Emma’s Revolution contacted us less than a month before the date to see if we could host a concert and folks really rose to the occasion to get it publicized and planned. It was our first public concert in two and a half years.

In March, Southern Rail returned to us for a Bluegrass Gospel service. This was another collaboration that had been postponed by COVID. It was great to have this group back for a service after many years hiatus. They appreciated the way we built the service around the songs and tied their message in to Universalism and Unitarianism. Attendance was strong and the spirit in the room was palpable.

Though the outward form of the music ministry has remained fairly constant, this year of interim transition and emergence from pandemic restrictions has required much internal change, re-thinking and flexibility. The years ahead will continue to offer challenge and opportunity for our congregation and this music ministry. May we journey together with grace, courage, and love.

Religious Education Program Annual Report
Rev. Amy Freedman
Minister of Religious Education

Our goal is to create a fun engaging environment for young people to connect, feel accepted, and explore together. We want to nurture their emotional, social and spiritual lives.

This was a re-building year for our Religious Education program! Each year, we report our attendance and enrollment to the UUA as part of the congregation certification process. Last year, we reported 75 young people. I am happy to report that 90 are currently enrolled in our Religious Education program and our average weekly participation is 49.

Worship

It is a joy to be an intergenerational community again! After being separated from the adult congregation since March 2020, young people were finally able to return to the Sanctuary in September 2022. This meant that children in 1st grade and older began in the service with their families before going to Religious Exploration. We also had several All Ages Services. This was the first time in a while that we were able to hold multiple Christmas Eve services in-person indoors. It was deeply moving to lead our 4pm Service with our Sanctuary filled with families.

Little RE & Teen Assistants

This Fall, we returned to using the Milldam Nursery School for Little RE, the program for our youngest children. Dawn Van Patten is the leader of this program which includes support and training of Teen Assistants who welcome families, engage children in play, facilitate our circle time, and lead crafts and activities. The relationships our teens form with children and families further deepens connection and belonging at First Parish. This year, ten teens participated in the program. Teens chose to earn community service credit or to be paid for their time.

1st to 5th Grades

Over the course of this year, this age group was in different configurations as they also had Little OWL and Middle OWL. This Fall 3rd- 5th grades explored UU Principles with active games, social justice activities, and craft projects. During the Holiday term, we had a Mini-Holiday Craft Workshop, celebrated Winter Holidays, and a Pick-up Pageant! We used the Soul Matters themes exploring “Finding Our Center”, Love, and Vulnerability. In March, Rev. Ken Reeves and I designed a UU Tweens program for our 4th and 5th graders. In the Spring, we combined all ages again with choices of activities.

Crossing Paths

This year we introduced “Crossing Paths” for our 6th, 7th and 8th graders. We explored Judaism, Christianity, Islam, Hinduism, and Buddhism while nurturing and deepening our Unitarian Universalist identity. This curriculum developed by Soul Matters is similar to Neighboring Faiths. I enjoyed co-leading many of the sessions. For each tradition, we engaged in experiential learning with activities, engaging questions, spiritual practices, and multi-media. A highlight was visiting houses of worship and interviewing people about their beliefs and traditions. After not being able to visit other houses of worship, it was a joy to visit and connect with Kerem Shalom, TriCon, the Islamic Center of Boston, Sri Lakshmi Temple, and the Providence Zen Center.

Junior Youth Group

Created during the pandemic, Junior Youth Group offers opportunities for 6th, 7th and 8th graders to build relationships with one another through conversation and activities. The group met monthly this year and was originally led by Lora Venesy and Dawn Van Patten. In the second half of the year, Junior Youth Group met jointly with the High School Youth Group and was led by Dawn and Madzie Burnham. The Junior High School Youth Group email list reaches close to 40 families.

Our Whole Lives

Comprehensive sexuality education is an essential part of our program offering accurate information, promoting well-being, health, and nurturing healthy relationships. This year we offered Little OWL (K-2), Middle OWL (5th grade), and 8th grade OWL. Lora Venesy continued as our lead sexuality educator. I am deeply grateful for the warmth, talent, and insights of all our trained OWL facilitators: Renee Lloyd, Jeff Brainerd, and Sarah Chapman. Declan Lloyd also served as a Teen Assistant for Little OWL.

Coming of Age

Coming of Age is an important rite of passage for our youth, families, and congregation. Ten 9th graders enrolled this year. Dawn did an excellent job leading our program that included time for connection, reflection, and fun. This year we were finally able to go on a UU Heritage Tour to Boston, have an overnight Winter Retreat, and pair each youth with a mentor. COA parents helped coordinate participation in CityReach, an overnight outreach program for the housing-insecure in Boston. The Coming of Age service was meaningful with teens sharing their credos, personal statements of belief, and leading worship.

High School Youth Group

Madzie Burnham has served as Lead Youth Advisor since 2017. I am grateful for Madzie's humor, authenticity, and steadfast support of our youth. Madzie is moving to Providence, RI and stepping down as Lead Advisor but promises to stay connected with First Parish. Highlights from this year include: CROP Walk, apple picking, S'more Justice (hosting UU Mass Action Youth Corp at First Parish), making food together, and meeting on Sunday afternoons for connection and conversation. Thanks to Youth Advisors Jon Mayer and Eric Moore!

RE Volunteers

Heartfelt thanks to 45 volunteers who supported our programs for children and teens this year! It was delightful to expand our offerings for different age groups. Our RE terms were 4 Sundays and some people signed up for more than one term and helped as needed.

In the words of this year's Backpack Blessing by Alex Haider-Winnett:

We look forward to this time of transition:

May we find comfort in the completion of work.

May we rest in the mystery of unanswered questions.

May we find ways to refresh our spirit and prepare for new times of learning.

Just as the seed sprouts in the dark quiet of the soil, may we find ways to grow in this time.

With Gratitude, Amy

Facilities Manager Annual Report

Bruce Davidson

Facilities Manager

Administrative and Workflow Process

- Frequently I photograph 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 maintained and improved a spreadsheet, Facilities Manager Master List, which has over 25 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 Sextons, Director of Operations Fifi Ball and Trustee Roselyn Romberg.
- I have developed an Assignment Tracker spreadsheet to manage 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 and Execution

- The number of events significantly increased year-over-year and the facilities organization provided setup of the physical spaces, AV assistance, reception coordination and various forms of assistance to internal and external groups.

Staff

- Cleaning staff for Mondays was added to the budget.
- Jok Ngor joined the facilities staff, working mainly Saturday and Sunday mornings, assisting with cleaning, coffee hour, memorial service and other events.
- I have been searching for and recruiting contractors with carpentry, painting, and repair skills. A few have been added to the call list.

Volunteers

- Barry Copp, Doug Baker, Rick Moore and Paula Adelson contributed greatly helping out with maintenance, gardening and preparation of the sanctuary for services.
- Tim Whitney, Rodger Matlage, Marshall Moore, and David Elwood stripped, sanded and are adding protective coatings to the Kopjafa pole.
- Berni Jenkins and Bob Andrews continued their great leadership of usher team.

Contractors/vendors:

- David Wisniewski and Arkadiy Barshteyn contributed greatly with AV services for Sunday services and many memorials and other events.
- A long search for various vendors who will be stable partners in the upkeep of the First Parish resulted in securing an HVAC contractor for the heat pumps.

Tools Acquired

- Power washer and miscellaneous power hand tools.

Projects

- **Meeting House Painting**
 - In Summer 2022, the Meeting House was scraped, sanded primed and painted.
- **Electrical Work**
 - LED Upgrades: In coordination with Gibbons Electric, we replaced the majority of lamps and fixtures where necessary.
 - Moved light switches for Parish Hall and Parlor to the wall outside the circuit panel.
- **Interior storms**
 - Assisted with measuring and planning the installation of custom interior storms for 57 windows.
 - Replaced #23 and #7 Church Green rotted and cracked pressure treated wood walkway with Wolf synthetic decking to provide traction and longevity.
- **Audio Visual system upgrade**
 - Assisted with planning design and contractor selection for Sanctuary and Parish Hall systems.
 - Will be overseeing installation and coordination of contractors.
 - Installed AV system with 75” monitor in Brooks Room
 - Will be installing two monitors for calendar and events promotion in the foyer and at the Sanford Couch.
- **Walkways**
 - Replaced #23 and #7 Church Green rotted and cracked pressure treated wood walkways with synthetic decking.

Projects planned for 2023-2024

- Finishing the painting exterior of #1,7,23 houses.
- Complete the Native Fruit Garden on the slope beside #7 Church Green. Granite posts installed, cedar branch trusses for wires to support Concord Grapes. Will also include blueberries, raspberries and rhubarb.
- Repave the asphalt walkway forefront driveway to Chapel to. Eliminate grading issues related to a tenant falling on ice puddle. (This will likely wait until future construction in the area related to the new heating system.)

- 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.
- Parish Hall and Parlor: insulation for walls and roofs
- #25 custom build a wood screen door. Paint it black.
- Val Holt Garden will have final masonry and annual Impatiens installed once the Kopjafa pole is restored.
- Parish Hall and Parlor insulation for walls and roofs. RFP is issued. Funding is 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 have built 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 assisted the Greening the First Parish Campus Task Force in securing quotes for various insulation and other weatherizing projects.
- Assisted with two prototype plexiglass window inserts in Sanctuary.
- Assisted with preparation for blower door test and infrared imagery. (2 tests)
- We have begun to weatherize areas of heat leakage illuminated by the blower door test and infrared scans. Specified, researched, and will 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.

Building Maintenance

Milldam Nursery School (MNS)

- New director at MNS and I worked on maintenance issues and services.

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

#1 Church Green/Coan House

- Summer 2023 we will be replacing the windows.
- By September 1 we will have made cosmetic improvements for returning tenant.

#7 Church Green/White Cottage

- Various light maintenance performed.

#23 Church Green/Thayer House

- Will supervise installation of spray foam insulation in roof (r-30) August 2023
- Minor repairs will be done at this time to the bathroom

#25 Church Green/Ball House

- A new tenant moved in February 2023.
- Light maintenance performed.

#10-6 Concord Greene e

- Light maintenance performed.

Wright Tavern

- I have continued to serve the Trustees of the Wright Tavern by identifying, arranging visits for contractors, and procuring proposals.

Events

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

First Parish Natural Resources

- Herb Garden
 - Doug Baker and Barry Copp deserve great thanks for replacing walkway boards, painted boxes and other woodwork, weeding, adding new herbs and polymeric sand to hold the brick joints.
- Johnson Garden
 - Continued 2nd year of extensive pruning to get the garden back in its intended form.
 - Weeded and mulched.
- Baker Garden
 - Weeded and mulched. Added spring bulbs.
- Edibles Garden Box Planters
 - Oversaw second annual planting with Eagle Scout Leah Greenburg.
- Val Holt Garden (approved by Historic Commission May 2022)
 - Designed and will build a garden around the Kopjafa pole.
 - Built a 5' diameter thin stone mortared wall for impatiens planting.
 - Installed shade plants and river rock.
- Native Fruit Garden in process
- **Education, Outreach and Hosting**
 - I continued working with Religious Education Team and Milldam Nursery School in creations including an outdoor learning space, design and construction of a little free library and a fairy house and education around composting and other natural resources appreciation and conservation.
- **Inspections**
 - All inspections were planned and performed in a timely manner. Apologies for the extraordinary downtime for the elevator.

Thank you to all staff and parishioners who helped me through the year!
Bruce Davidson, Facilities Manager. 9/1/2020-present.

Annual Report for Social Action
Rev. Paul Langston-Daley
Minister for Social Action

This year has been a very productive year for the Social Action committees and groups. I am pleased that increased levels of collaboration have allowed us to create some significant events for the church and for the larger community. We held numerous successful events this year that deepened our knowledge and understanding of many issues. We participated in activities that matter to us and collaborated with local organizations to provide resources and support. We are active in the DEI issues of the town and the high school and continue the work of increasing civic involvement and working for collective liberation.

Collaborative events included:

CB Beal's Preemptive Radical Inclusion workshop for the congregation

Guest speakers included: Bill McGibben, Greeley Scholar, Dayamani Barla and several outstanding guests for the Democracy Festival.

At the end of May 2023 we held a Democracy Festival, proposed by the Reclaim our Democracy Group. The intent was to increase civic participation and to support and defend our democracy and our democratic values. Ninety volunteers came together to create and present a festival grounded in our belief that Democracy and civic engagement are vital to the health and well being of the United States. We brought together some 27 organizations and church committees from local, statewide and national organizations to network, educate, and have some fun. Giant puppets, apple cider served from the bar of the Wright Tavern, singing, games and arts and craft projects were all part of the event as well. Rain caused us to be indoors and still the event drew hundreds of visitors with positive raves as networking and relationship building were central to the event. It is my hope we will host this event again next year.

This year an advisory committee was formed to help provide support and direction to the Social Action programs and also to help with things like Share the Plate selection and affiliate giving. Our hope is to begin adding several service projects next year to allow more onramps for people looking to engage with social justice concerns and issues. We had low turnout this year for the two service projects that have been part of the church for more than a decade, the Louis D Brown Mother's Day Walk and the Crop walk. It is worth noting that financial contributions to the Mother's Day Walk far outpaced other Share the Plate opportunities. The Crop was discontinued in the coming year by the town. Again, our hope is we can find activities to engage the congregation and increase participation in projects that matter to this community and to the world.

Like many congregations across the country, we have run into some difficulties with leadership transition in several committees and groups, and I am confident these will be resolved. The implementation of a Leadership Development Committee by the Standing Committee will be a vital part of leadership transition as we move forward. It may be that a few committees will need to lay fallow for the coming year if leadership cannot be found to take them on. New groups may form as the congregation engages in the issues that matter to us.

I'd like to end my report with deep gratitude for the many committed and caring volunteers who make the work of Social Action an integral part of their life both here at First Parish and beyond.

SAC PROGRAM REPORTS

Advocates for Women's Empowerment (AWE)

Co-Chairs: Lora Venesy venesy@comcast.net and Suzie Weaver skatesuzie@aol.com

Mission: AWE is a social action group that is dedicated to advancing the rights and lives of women, through advocacy, direct action, and education.

Vision: We envision a world where all genders work to optimize women's quality of life by removing social, economic, political, and institutional barriers, to promote choices, access, and agency.

Background: In 2012, after 'Reproductive Justice' was made a priority at General Assembly, a group formed at First Parish. In 2016, the group changed its name from "Reproductive Justice" to "Advocates for Women's Empowerment" (or AWE). AWE meets periodically, coordinates regular activities, a monthly newsletter, and an active Facebook page <https://www.facebook.com/concordwomen/>. AWE is open and welcome to all, regardless of age, gender, faith, orientation, etc. There are currently approximately 15 active members and 140+ friends, which include both FP and community members.

Year in review:

- Meetings- In prior years, we met monthly for housekeeping, community building, planning, & discussions. This year we held occasional meetings via Zoom or in person at local cafes.
- LunaFest- We held the 9th annual women's film festival at Concord Academy on November 5, 2022. The event raised over \$1000 to benefit Planned Parenthood of Massachusetts and was the first in-person event since the beginning of the pandemic. We hosted our 10th annual film festival, with free admission and complimentary desserts, on May 21, 2023, at First Parish, with cash and check donations accepted. LunaFest is pausing the festival as of June 2023, so our May 2023 event may be the last one.
- Toiletry Drive- We did not hold our annual drive for Rosie's Place this year but hope to hold one in the future.
- Rosie's Place Volunteering- We have not taken volunteer trips to make meals at Rosie's Place since prior to the pandemic, as the size of the group is limited to only 5 people who must be age 16 or older. If restrictions are loosened, we hope to continue this initiative in the future.
- Get Out the Vote Postcard writing- We hosted several evenings of postcard writing in collaboration with UU The Vote in October in advance of the November 2022 elections.
- Collaborations- Continued participation in larger women's rights communities. Members of AWE are represented in groups such as the Boston Red Cloaks, Mystic Valley Action for Choice, and others periodically.

Goals for 2023-24: We hope to continue in-person get-togethers to advocate, volunteer, and build community. We will continue other activities to increase education and awareness for women's issues, as well as continue to be leaders in the fight for women's reproductive justice.

Amnesty International, Local Group 15

Contacts: Nancy Lyons <mailto:njlyons22@gmail.com>, 978-505-1936, Kathleen Bean kathleenbean@gmail.com, 978-443-8216

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

Friends of First Parish: Kathleen Bean, Evan Hadingham

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

Membership: 14 members

Group 15 meets monthly throughout the year. Our meetings were held virtually during COVID. Recently we held our first in-person meeting. Regular activities include:

Urgent Action Letter: Amnesty's Urgent Action Network is a global program that urges action for human rights activists who are at immediate risk. Each month we send a letter, advocating for an activist who has been imprisoned or faces other punishment for peaceful actions. We discuss the background and features of each case.

Individual at Risk/Prisoner of Conscience program: Our Individual at Risk coordinator brings updates and actions to our meetings. We are currently advocating for Bozorhmer Yorov, a human rights lawyer from Tajikistan. Because Yorov has represented the opposition Social Democratic Party of Tajikistan, he was sentenced to 23 years for representing members of the banned Islamic Revival Party (IRPT). Ongoing research helps inform our advocacy, support and letters to officials, such as the Tajikistan Minister of Justice and the U.S. Ambassador to Tajikistan.

Death Penalty: Group 15, along with AI USA, believes that the death penalty breaches human rights. We believe that as a society, we need to affirm that killing is wrong, and we cannot do this by killing more people. We provide monthly updates to the Group on current death penalty news, and have taken actions to end the death penalty in the US. We have written letters to Governor Greg Abbott of Texas urging him to take definitive steps to end the use of the death penalty in the State of Texas. We have also written to President Joe Biden urging him to immediately commute all existing federal death sentences and to dismantle the federal execution chamber. In addition, we have asked him to actively oppose executions at the state level, and ensure that his administration does nothing to facilitate the death penalty in states, whether in litigation, before treaty or regional bodies, or in relation to execution methods. We continue to sign electronic petitions received from Abe Bonowitz, Executive Director of Death Penalty Action, on a regular basis. In April we participated in Amnesty's Interfaith Action Against the Death Penalty.

LGBTQ: We are educating ourselves about the LGBTQ community, and discussing legislation and policies that affect their rights and safety.

Community Partnership with Dignity in Asylum (DIAS): Community Partnership is an Amnesty International program to help assist refugees and asylum seekers to reach and settle in a safe country. Group 15 has entered into a Community Partnership with Dignity in Asylum (DIAS), a local non-profit organization, entirely run by volunteers. DIAS provides free housing and community support to people seeking asylum. Help with groceries, transportation to lawyers'

and doctors appointments, English classes and overall caring and comforting support, are provided by volunteers from the local community. The Community Partnership agreement formalizes Group 15's long standing commitment to DIAS, through donations of funds and the hosting of fundraising events.

Criminal Justice/solitary confinement: We have participated in efforts to address injustice in our criminal justice system, such as solitary confinement, bias, racism, wrongful convictions, excessive punishment, treatment of juveniles, and prison conditions. We advocated for two bills in the MA legislation-addressing protection for prisoners in segregated confinement and a bill to ensure the constitutional rights and human dignity of prisoners on mental health watch. We have done extensive advocacy on behalf of indigenous activist Leonard Peltier, who has been imprisoned in the United States for over 46 years despite serious and ongoing concerns over the fairness of his trial, conviction and parole hearings. We are urging President Biden to grant clemency for Mr. Peltier.

Immigration and asylum: We have continued to focus on immigration-related legislation and policy, both in Massachusetts- the Safe Communities Act, Work and Family Mobility Act, No Cost Calls, and federally-the Afghan Adjustment Act and proposed asylum rule. We also collaborate with the F.P. Immigration Justice Task Force (IJTF); with the sharing of actions and a member of our group attending the F.P. Concord Immigration Justice Task Force meetings. Both groups have advocated for Pastor Steven Tendo, a Ugandan seeking asylum who was in detention and is now working in Vermont.

Amnesty campaigns: Group 15 participates in several global campaigns which address individuals who are at risk for their activism: Banned Books Week and Write for Rights.

Guest Speakers: We have had several Amnesty staff join our meetings to share updates on Amnesty and our Individual at Risk case.

Looking ahead:

Group 15 will continue regular monthly activities. As COVID restrictions have lessened we look forward to having outreach activities within Concord and surrounding communities. We are planning a booth for Concord's July 4th Picnic in the Park celebration, with general information about our group and Dignity in Asylum. We expect to continue joining with other human rights related groups and organizations, including First Parish Concord Immigration Justice Task Force and Dignity in Asylum.

Submitted by Kathleen Bean for Amnesty International Local Group 15

Diversity Committee

Members: Sara Ballard (Chair), Joyce Biggs, Stan Griffith, Jan Power, Sallie Satterthwaite, Dana Snyder-Grant, and Suzie Weaver.

This year the Diversity Committee continued working on meeting requirements for the annual re-chartering process for First Parish to be recognized as a Welcoming Congregation by the UUA. In March we arranged for and organized a daylong workshop on Preemptive Radical Inclusion by activist and educator CB Beal. We will be participating in the Democracy Fair on May 20, and we'll take a group to the Pride Service at the Arlington Street Church and to march in the Pride Parade afterwards on June 10. We nominated BAGLY (the Boston Alliance of Gay, Lesbian, Bisexual, and Transgender Youth) as the recipient of the June Share-the-Plate at First Parish.

Respectfully Submitted,
Sara Ballard, Chair

Environmental Team

7th Principle: Respect for the interdependent web of all existence of which we are a part.

Members: Gail Kharidia (chair) gail.kharidia@gmail.com, Robert Andrews, Berni Jenkins, Brooks Stevens, Richard Keleher, Pamela Dritt, Andy Puchrik, Dian Pekin, Janet Rothrock

History of the Environmental Team:

After several years of work carried out by a Green Sanctuary Committee, the congregation voted to become a Green Sanctuary at the Annual Meeting in 2009 and our application was acted upon by the UUA in 2011. We became, at that point, an accredited Green Sanctuary church. Once accredited, and after a period of "Green Visioning" led by one of our ministers, the Environmental Leadership Team was created.

The Team's role was defined as one that emphasized guidance and consultation to all church programs and church leaders on how they might most effectively contribute to meeting the goals of the Green Sanctuary program. We have consistently and repeatedly advocated for modifications of church policy and programming that express our shared environmental values. This has included special Earth Day services, environmental programming for children and youth, divestment from fossil fuel investments, solar panels on the church roof, and participation in local and national programs such as the Climate Solutions Speaker Series and the big climate march in Washington.

2022-2023 Annual Report:

- A. Decision making** - The Environmental Team moved from a yes/no vote on proposals to a consensus decision making process. This enables all participants to voice their concerns, raise questions and make changes to bring everyone in agreement.

B. Projects

1. **Climate Media Project.** The Environmental Team developed a Media List for educating the congregation on environmental issues and climate change. Led by Pamila Dritt and Gail Kharidia, the list includes books, You-Tube videos, podcasts and articles. The *Climate Media Selection List* proposes media for 8 months, from July 2022 through February 2023. A discussion meeting was held each month on that month's media. With an abundance of recommendations by the ET, a second *Climate Media Alternate List* was developed.
2. **Presentation by Peter Lowitt on Greening of the Campus.** The ET asked Peter Lowitt to give a slide presentation on environmental changes at the church on January 17, 2023. It was widely publicized to the congregations through our regular PR channels and to FP to task forces and small groups. It was also publicized through ConcordCan, Mother's Out Front, to other churches in town, and to our mailing list. Approximately 40 people attended.
3. **Share the Plate.** In 2022 ET was successful in obtaining Share the Plate for Mass Climate Action Network. MCAN facilitates municipal-level action, working with local MCAN chapters. It also works at the state and regional level and with partner organizations, including neighborhood and faith associations and affinity groups, to help them take action on climate change. In 2023, ET nominated One Tree Planted located in Vermont. It plants trees in 47 countries working with local organizations. It has doubled the number of trees planted annually since it was founded in 2014 and it planted 52 million trees in 2022.
4. **Assistance with Earth Day Church Service April 23, 2023.** Robert Andrews of the ET asked the Ministry to focus on a Service for Earth Day as they had in the past. (Earth Day is annually on April 22.) Bob and Gail provided input to Rev. Amy Freedman. Bob gave a presentation during service reflecting on the work of the ET over the years. At Coffee Hour, Brooks Stevens provided plant-based food: hummus and pita bread. Food was prepared and serviced by Joyce Biggs. Gail provided handouts on the environment and climate.
5. **Partnering with Other FP Task Forces.** The ET co-sponsored with the IJTF Bill McKibben's presentation at the CC High School April 2 on the climate and partnered with the WPA for a presentation by Dayamani Barla on indigenous battles in India on climate. Ms. Barla is the 2023 Greeley Scholar for Peace. Her presentation was at FP on April 16. The ET sent out announcements to its contact list for both events.
6. **Partnering Beyond FP.** We joined forces with the Brookline UU and borrowed their banner, "The Earth Defenders," hanging at the church entrance for the month of May 2023. The banner lists and honors persons who gave their lives in 2021 fighting for the environment and climate. The people were identified by Global Witness. We are also partnering with Mother's Out Front, the Mass Sierra Club, UU Mass Action Org and Massachusetts Climate Action Network in advocating for state legislation.

7. **Democracy Festival.** We are participating in the congregation-wide Democracy Festival sponsored by ROC on May 20, 2023. We are providing handouts on the environment and climate, and anticipate that Alfred Brownell from the Brookline UU will attend to share his story about fleeing Liberia due to his legal successes in stopping the clearing of trees and the displacement of farmers from their lands. A story of Democracy and Social Action!
8. **Priorities for July 2023 through June 2024.** For the coming fiscal year, the ET agreed at its April 23rd meeting upon three action priorities:
 - a. Advocating for State Legislation, working with other regional and state groups.
 - b. Sustainable Middlesex Carbon Countdown, a collaborative regional project.
 - c. Halting the Hanscom Field Expansion.

Respectfully submitted,
Gail Kharidia, chairperson
Environmental Team

Immigration Justice Task Force (IJTF)

Co-Chairs: Laura Van Loon, Tony Rodriguez

Active members: Janet Donovan, Regina Corrao, Jane Blumberg, Ted Bayne, Rachel Wheeler, Nancy Kerr, Jessica Bethoney, Joyce Pulcini, Suzanne Knight, Kathleen Bean

Adjunct members: John Moses, Hope Rubin, Jodi Hilton, Riaz Zolfonoon

The mission of the First Parish Immigration Justice Task Force (IJTF) is to support vulnerable migrants, 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 primarily via Zoom. Attendance continues to average 9-12, with another 6-8 inactive members. 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 have been Tony Rodriguez (trod.rodriguez@gmail.com), Regina Corrao (reginacorraoconsulting@gmail.com), and Laurie Van Loon (lvvanloon11@gmail.com). Others have taken on a variety of leadership and ancillary roles.

Task Force Structures, Initiatives, and Activism that Continued or Broadened 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: notices of upcoming events and urgent activism requests in *First Parish Weekly*, and notices on the First Parish Facebook page as well as the Social Action area of the website. Since the redesign of *First Parish Weekly*, we have added lengthier reports in the fourth-week Social Action focused issue. We have appreciated the support of Paul Langston-Daley in his role as Social Action Minister this 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.

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 continues to address our goals and actions going forward, track initiatives and progress, and clarify which members have volunteered for specific actions or areas of attention. After reviewing the status of our existing goals at the end of this church year, 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 Tony Rodriguez, and aid to her deported son Isidro living in Guatemala. We are delighted that our financial support enabled Isidro to graduate from university.

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, No-Cost Phone Calls, 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. We have collaborated with UUMA-Action, including on Advocacy Day, and with the newly formed UUMA-Action immigration justice group.

New Initiatives and Evolving Actions In 2022-23:

Share the Plate:

Our border concerns have intensified this year, and two organizations related to safety and justice for those waiting at the Mexican border, Al Otro Lado and the KINO initiative, were nominated for and chosen for this year's Share the Plate.

Afghan Family support:

This has been a year of enormous effort and support for two Afghan families: two Afghan sisters who are now living in Waltham, and the Hakimi family in Lowell. The two sisters, with the help of our Kareem Shalom partners, have been able to complete their applications for stable immigration status and we are awaiting the results. Regina Corrao, support team member, reports to the task force on their progress, which has been steady. Through the help of their team, and their own actions, they have become much more independent.

For the two-part Lowell Afghan family, who arrived in November of 2021, primary FP support participants include Jane Blumberg, Tony Rodriguez, Rachel Wheeler, Joyce Pulcini, Janet Donovan, Ted Bayne, Regina Corrao, and Suzanne Knight. From beyond FP, Mav Pardee and Barbara Maloney have been actively involved with essential help, and Riaz Zolfonoon has provided essential translation and accompaniment services. Jane Blumberg served as volunteer coordinator in Lowell for much of this year, and she reports regularly in depth to the task force on day-to-day events and volunteer assistance. Volunteers have often worked almost full-time on crisis intervention, school relations, housing, medical and dental appointments, economics and budgeting, tutoring, employment, liaison with IINE, arranging ESL and other activities, and multiple forms of advocacy and practical help. Donated funds have been carefully managed. The extended family, one part composed of three young men now living on their own, and the other, two parents with their children, is large, complex, with a wide age range, and there have been frequent urgent interventions. In addition, many in the family wish to provide financial help to those left behind in Afghanistan. The team's goal continues to be greater independence and confidence by adult family members, and successful adjustment by the children. Signs of progress are slow but apparent.

In both these families, legal steps have been slow to take place. That the Afghan Adjustment Act has failed to pass complicates their future. All are applying for asylum and for Temporary Protected Status.

Three adjunct members have joined our task force in the second half of the church year to share their efforts in relation to Afghans: John Moses, who works to bring those allies still in Afghanistan to the US, as well as support for refugees who've arrived; Jodi Hilton, supporting those in peril in Afghanistan and beyond; and Hope Rubin, who contributes with advocacy opportunities. Their input has enriched our understanding of wider concerns for those fleeing persecution.

New education initiatives to First Parish and beyond:

In early April, IJTF joined forces with ELT, RJAG, the Concord-Carlisle League of Women Voters, CCHS, and multiple additional co-sponsors outside FP to bring environmental

activist Bill McKibben to Concord to speak on Climate Change, Migration, and Racism. The high school auditorium was filled to capacity. Those who missed his talk have the opportunity to hear it recorded.

In late May, the IJTF brings immigration policy expert Muzaffar Chishti to report on changes since his last talk two years ago. He will describe migration patterns in the US and Caribbean, and policy shifts that affect them. This will be a hybrid event, live at FP and also on Zoom.

Priorities for the next church year will no doubt include continued education and advocacy, both immediate and longer-term, as well as furthering self-sufficiency for our Afghan families.

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

Partner Congregation Committee

Members: Lillian Anderson and 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, Kathy Booth, Barbara Olson (Co-chairs, Student Scholarship Sub-committee), 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:* We had several calls throughout the year (approximately every 2 months).
- *Facebook Messenger:* Group chat was created between Partnerships.
- *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 2022 Christmas Eve collections (one half of the total collection) was wired to Keresztúr in February.
- *UUPCC and ICUU:* Organizations have been dissolved as of fall, 2021. The UUA has established an International office and it is headed by the Rev. Morgan McLean. They are handling the wire transfers to our partner congregations. We did make a \$450 donation to them.
- *Graduation notes and gifts:* Sent by Kathy to all graduates for spring, 2022.
- *Graduation:* Barbara Olson wrote a speech for graduation, spring 2023, which will be read there.
- *Kopjafa refinishing:* Major work on refinishing this spring (Doug Hardy, Rodger Mattlage, Marshall Moore, Tim Whitney) hopefully completed by June.
- *Val Holt Memorial:* Landscaping around Kopjafa has been approved by the Concord Historic Districts Commission and will be completed by June 2023 by Bruce Davidson.

- *Partnership Anniversary*: 30th anniversary of the Partnership is in 2023 (see below for details)
- *Neighboring PCC Forums*: We have held two forums (one in March and one in May) gathering representatives from King's Chapel, Follen church, Winchester, Weston, Brewster, Stow/Acton, Belmont, Bedford, Duxbury, Newburyport to share information about the state of their partnerships as well as to confront the difficult issues of approaching differing values. We have been helped by the Rev. John Gibbons, minister emeritus from First Parish in Bedford and the Rev. Harold Babcock, the UUA Ambassador to the Hungarian Unitarian church, both of whom have traveled to Transylvania recently. We are planning to convene again early in September.

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 2022 - 2023 academic year, fifty-five students (forty-one at Berde Mózes Unitarian High School and fourteen in colleges and universities) are supported with a total of \$24,200 in scholarships donated by sixty-one 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.
- *Graduation Gifts and Cards*: Ten Senior graduating scholarship students have been sent a \$50 gift each (which adds us to another \$500 in donations) and a congratulations card from their sponsors, to be given to them at their graduation ceremony at the end of May. Barbara Olson will be sending a congratulatory speech from our congregation to be delivered at the graduation.

Future Trip Planning

Concord and Keresztúr have continued active conversations and planning for travel:

- 12 travelers: Co-leaders Rodger Matlage and Tim Whitney; Pat Brinkman, David Elwood, Doug Hardy, Dana Lissy, Marshall Moore, Beth Norton (staff), Barbara Olson, Leah Russell, Roselyn Romburg, Dawn Van Patten (staff)
- Trip dates: September 20, 2023 to October 2, 2023
- Using arts and other activities as shared experiences: dance, music, cooking, crafts, etc. We will be celebrating their Thanksgiving holiday and our 30th anniversary of the founding of the Partnership.

30th Anniversary Celebration Plans

- We will be developing a comprehensive book that chronicles all of our previous travel and scholarship history.
- We will be producing a video.
- We will be taking a gift to present to our partner congregation.
- We will be celebrating the return of our travelers and 30th anniversary on Saturday, October 28 for a pot-luck dinner in the FP Parish Hall.

Respectfully submitted,
Lillian Anderson and Tim Whitney, Co-Chairs
(lillianand@comcast.net, timothywwhitney@gmail.com)
Partner Congregation Committee

Racial Justice Action Group (RJAG)

Annual Report Leadership Team: Sally Lewis sallewis3@gmail.com and Sue StCroix sue@suestcroix.com

Participation – 63 Individuals subscribed to the RJAG Google Group mailing list and between 8-12 individuals consistently attended monthly meetings.

Goals for 2022-2023 Social Action Year

Our primary goal for the upcoming social action year is to increase awareness and action against the pervasive issue of racism within our society.

1. Education

To develop events or activities which will alert congregation to racism in society today and motivate others to become involved in anti-racism work.

Events

- Co-sponsored a 4-session presentation and discussion series with the League of Women Voters on Concord history of Diversity, Equity and Inclusion. September and October
- Co-sponsored a screening of the documentary “*Who We Are: A Chronicle of Racism in America*” with Communities Organized Against Racism (COAR) aimed at charting the history of anti-Black racism in America from slavery to present day. January
- Compiled a book list and purchased a rolling bookshelf stocked with racial justice-oriented books for the congregation to peruse during coffee hour. January
- Organized an all-church Book Read of “So You Want To Talk About Race” by Ijeoma Oluo which was facilitated by RJAG members in small group discussions. April
- Collaborated with Immigration Justice Task Force (IJTF) to host Bill McKibbin, a renowned Climate Change specialist to speak on the “the intersection of climate change, migration and racial justice.” April
- Collaborated with WPA to bring the 2023 Greeley Peace Scholar, Daymani Barla, an Adivisa (Indigenous) Environmental Activist, Journalist, Writer and StoryTeller to present to members of the community at First Parish. May
- Organized First Parish and other interested UUs to attend the Louis D Brown walk for Peace in Boston for the 17th year. Raised \$6,000 for the Louis D Brown Peace Institute. May
- Collaborated with Reclaim our Democracy to create a “Democracy Festival” to educate congregants on aspects of democracy, social action, and civic responsibility. May

2. Increase FPC visibility and effectiveness by more engagement with partners* that share our UU and racial justice values.

Actions

- Support Communities Organized Against Racism by attending school committee meetings and working toward common goals, e.g. Ongoing
- Developing a program on microaggression incidents in Concord with members of IJTF, Concord DEI Commission, CCHS, Concord Academy. October
- Collaborating with CCHS and Junior High METCO program to create a safe space for teens to meet and “hang out” together. Ongoing
- Collaborate with FP Lincoln to share ideas, knowledge of anti-racism work, and racial justice programs in the area. Ongoing
- Support Concord DEI Commission by publicizing events, attending their meetings and engaging in program development. Ongoing
- Rebecca Winborn and Leslie Fisher continue to represent First Parish as delegates for a second year and kept FPC informed about UUUM activities.
 - Posted links in FP Weekly re: 4 virtual Community Conversations; opportunities to help in their Peace Garden and help City Life/Vida with mailings (2 people attended); 3 Jazz on the Green concerts (several people attended) and a one-man play; Holiday Shopping Guide featuring Roxbury area artists being highlighted by UUUM; Opera unMet concert honoring MLK Jr.; the report on “We Speak Now: Race and Slavery at First Church Roxbury.”
 - Publicized the “Pews Project” fundraising effort for the meetinghouse renovation and coordinated \$3,000 in donations.
 - Manned table at coffee hour for 4 Sundays for Mother’s Day card fundraiser to benefit the Roxbury Youth program, collecting \$775 and spreading the news about UUUM’s work. Ongoing

3. Legislative Work

Actions

- Collaborated with Fred Van Deusen, Ian Simmons, and Paul Langston-Daley to work with UU the Vote actions to get out the vote. This included congregational postcarding, contacting colleges for student voter registration, and texting sessions to get out the vote held at First Parish. Sept, Oct.

4. Increase collaboration with internal First Parish Groups to help foster more racial justice work church wide.

Actions

- RJAG representation on COIC which has reviewed FPC’s by-laws for aspects that and have shared their findings and recommendations with the Standing Committee. One of

the immediate actions is to remove “legal speak” and power differentiators that often white supremacy cultures intact. The committee is also working on next year’s focus. Ongoing

- Welcoming Walls – RJAG members Cindy Soule, Leslie Fisher, and Marshall Moore kicked off the project. Others including Don Miller, Jim Sherblom and Holly Cratsley have been engaged in aspects of the project. The goal of the project is to examine the literal walls of the church and recommend changes to create a more welcoming and engaging image of the church. Ongoing

Reclaim Our Democracy

Planning Team: Fred Van Deusen (chair), Diane Proctor, Ray Andrews, Sue St. Croix, Kathy Mayer, Philippe Prokocimer, and Sandy Currier

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 two in-person meetings in May, we met via Zoom during the year.

Throughout the year we continued to publish our biweekly Reclaim Our Democracy Newsletter that contains 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**.

In the fall of 2022 we focused our efforts on supporting the groups that were working to get out the vote for the 2022 mid-term elections. We wrote postcards with Center for Common Ground, wrote letters with Vote Forward and the UUSJ Democracy Action Team, and did text banking

with the Poor People's Campaign and the League of Women Voters. We organized writing and texting events for members of the congregation. Together we sent out 1350 Postcards, 45,000 text messages, and knocked on many doors in NH. We worked as election protectors and poll workers. We spoke to neighbors and friends and confirmed with the rest of the country that we support democratic values that support families and communities over personal or corporate interests.

There is no question that democracy is under attack In the U.S. and in countries around the world. We saw it in the January 6, 2021 attack on the Capitol. We see it in the efforts of many states to restrict voting rights, to ban books, to attack LGBTQ and women's rights; and we see similar behavior at the Supreme Court and the U.S. House of Representatives.

At the beginning of 2023, we relaunched our website to focus on the battle between democracy and authoritarianism. More than 80,000 people have visited the ReclaimOurDemocracy.org website. It contains a great deal of useful information about what is happening to our democracy and why, and what we need to do about it.

In February we decided to launch a new initiative to engage people in our democracy, and increase civic awareness and participation. For the past four months we have worked tirelessly to plan and organize a Democracy Festival at First Parish in Concord.

On Friday, May 19 we kicked off the Democracy Festival with a very well attended and highly regarded panel discussion titled **Democracy: Its Value and for Whom?** with four excellent speakers:

1. **Danielle Allen**, Harvard professor and founder of Partners in Democracy
2. **Irena Koval**, Ukrainian playwright, novelist and essayist
3. **Shanique Spaulding**, Executive Director, MA Voter Table
4. **Jim Tull**, expert in international conflict management

Diane Proctor, a member of our team, moderated the discussion. The event video is available at <https://youtu.be/pYWdib-p3Fw>.

On Saturday, May 20, from 11:00am-2:00pm, First Parish in Concord hosted a non-partisan **Democracy Festival**. Our goal was to bring together people from all over to celebrate democracy, have fun, enjoy food from local restaurants, listen to good music, explore our artistry, meet local politicians, and learn about current issues facing our country and how we can help. We definitely achieved our goal in spite of the rain that day.

We moved the event inside and twenty-seven different social justice groups participated in the event. It was a great success. The church was alive with conversation — people engaging with one another about needed social change, democracy, voting, Ukraine, the environment, immigration, civil liberties, women's rights, racial justice, diversity, LGBTQ+ rights, important events in history, campaign finance reform, antisemitism, and having community owned local news media and a grocery co-op.

That's what civic engagement is all about. It's what we need in order to have a healthy democracy. We have received dozens of positive comments from members of the various participating organizations and from the attendees. People loved the festival!

Active members of our planning team include Fred Van Deusen, Diane Proctor, Ray Andrews, Sue St. Croix, Kathy Mayer, Philippe Prokocimer, and Sandy Currier. With the help of Social Action Minister Paul Langston-Daley, this group planned, organized, and implemented the Democracy Festival.

For more information about Reclaim Our Democracy at First Parish in Concord, email Fred Van Deusen at fredvandeu@gmail.com. All are welcome to join our mailing list and attend our meetings and events.

COMMITTEE REPORTS

Standing Committee Report

Members: Liz Rust(chair), Gib Metcalf, Heather Packard, Jennifer Izzo Clerk, Mike Beer, Jim Hawks, CC King, Caroline Minkin, Jim Reynolds, Susan See, Virginia Taylor

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

We started the church year still not fully back from COVID – remember that? and it has taken almost the full year to be fully back. We are just now mask-optional in the sanctuary and committees are meeting once again onsite in person using our enhanced multi-platform technology. It is good to be together in person, as well as having zoom options when needed. We will always thank COVID for Zoom ☺

This year was most notably marked as our first transition year, led by Reverend Seth Carrier-Ladd. Seth has ably assisted First Parish in the transition between settled senior ministers and has actively engaged the entire community in this work to prepare for our new spiritual leader. The Standing Committee continues to work in the three major goal areas we have set. These areas will continue to be our focus areas in the years to come.

Governance: The Standing Committee took a hard look at how governance works at First Parish, both on paper and in practice. Starting by consultation with the UUA, we identified areas where roles and responsibilities between the Standing Committee, Senior Minister, and Congregation were unclear in practice and where our joint responsibility to define and carry out a single set of annual goals was not well defined. In our governance model, one of the key Standing Committee's responsibilities is to work with the Congregation to determine annual goals, or ends, which we then give to the Senior Minister, who is responsible for operations. This spring, we worked with staff to adopt preliminary ENDS STATEMENT – strategic goal statements that grow from our values. The Standing Committee will work with the congregation next year to further refine these.

Community, Belonging and Communication: In the critical area of engagement and connection, we started the year by contacting everyone in the congregation to welcome us back together. We then continued to promote and sponsor engagement and community life. We recruited - the transition team, charged with assisting the interim Senior Minister explore the areas of conflict, identity, strengths, needs and challenges; and the Search Committee, canvassing the congregation for trusted individuals in this important process. We convened the committee chairs, and again sponsored a winter congregational retreat in February, and had some fun with the First Parish Talent Show in April, which was widely attended and showcasing our talented congregation with some talent, or at least the willingness to get up and try. We are ending the year with the presentation of the First Parish Covenant, a promise and commitment to hold our values together.

Sustainability and Long-Term Finance: In the important segment of our financial sustainability, we have key focus areas. First, we recognize both the persistent deficits we've had

with our annual budget these past few years, which were not surprising given the impact COVID had on our costs and cutting into pledges and other revenue. To that end, we started the year with completing a short successful fundraising campaign to Close the Gap, for shortfalls in our current FY23 budget. Then we moved into planning for our FY24r budget and committing to presenting a no-deficit budget – which we have done, thanks for some generous assistance. Next, we are looking towards longer term planning to address the risk of losing very large donors.

Of course, the Standing Committee also takes up any other business that comes before the board, of which this year was no exception. This year, we received status updates from the COIC, CLC, Wright Tavern and the Greening the Campus teams. We updated our Disruptive Behavior policy; encouraged, reviewed and approved initial design for adding rails to the pulpit in the sanctuary, and we were briefed on the Article II proposed changes for the UUA General Assembly.

The Standing Committee thanks Jim Hawks for his years of service on the committee, and Heather Packard for her two years as Treasurer, and we welcome Lisa Bennett and Leah Russell in their new roles. And welcome back the others of the team.

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

Sincerely,

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

Commission on Institutional Change (COIC)

COIC Members: Darien Smith (co-chair), Toby Smith Ropeik (co-chair), Peter Nobile, Ken Reeves, Cindy Soule, Dana Snyder-Grant

NOTE: In November 2022, personal priorities forced Jennipher Burgess to resign from COIC. Though we were unable to find another person of color to replace her, there are now several people willing to consult with us on an as needed basis.

COIC Charge from the Standing Committee

The First Parish Standing Committee established the Commission on Institutional Change (COIC) in the fall of 2021 with the following 3-point charge:

- *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. An example might be working toward congregational adoption of the 8th Principle.*
- *To recommend action(s) that serve to dismantle white supremacy within the culture, practice, policies and procedures within FPC. An example might be carrying out the “Welcoming Walls” initiative.*

Eliminating Oppression

While we all wish there was an easy and effective way to end all forms of societal oppression, we on the COIC have learned that every task we undertake winds up being more complicated and time consuming than first imagined. That, despite the fact that there is already measurable support for COIC's goals within the First Parish community.

Righting the ills caused by institutional racism, for example, will require many privileged white people to acknowledge the enormous advantages they and their ancestors have had across the generations, as distinct from individual abilities and efforts. That requires a profound psychological shift.

Anti-oppression work invariably requires the steady chipping away of practices and policies that have intentionally and unintentionally fostered the status quo and sustained systemic oppression. The members of COIC understand our work will be a long and slow process. And this is only an *interim report*. We are pleased to be engaging with the First Parish community and together contributing to the wider, generations-long, societal shift that is so badly needed.

COIC Work Completed

- Created and filed COIC charter.
- Approved a COIC covenant.
- Met with Rev. Howard Dana, Rev. Seth Carrier-Ladd and Rev. Paul Langston-Daley.
- Conducted one-on-one interviews with congregational leaders to learn more about their work, what they think COIC needs to know, and how COIC can best coordinate any related anti-oppression efforts. Interviews were conducted with leaders of the following groups:

The Standing Committee	Trustees
Congregational Life	Diversity Committee
Wright Tavern Legacy Trust	WPA
Partner Church Committee	Nominating Committee
AWE	Reclaim Our Democracy
RJAG	Immigration Justice Task Force
First Tuesday Group	Jewish Awareness Group
Pastoral care (Liz Weber)	Religious Exploration (Amy Freedman)
Social Justice (Paul Langston-Daley)	Music (Beth Norton)

- Created our own web page, which is updated regularly.
- Read and discussed the UUA's *Widening the Circle* report.
- Explored what nearby towns and congregations are doing with DEAI work.
- Engaged in training on the nature and process of change.
- Studied ways to handle *difficult conversations*.
- Supported the 8th UU Principle; passed by the First Parish congregation.
- Sponsored Kickoff Event - *Afro-American History in Concord Tour* - October 16, 2022 - led by Mary-Wren vanderWilden.
- Three additional COIC members completed Jubilee Three Training.
- Removed the brochure entitled "A Brief History of First Parish," which contained some potentially offensive language.
- Partnered with RJAG to create a mobile reading cart with DEAI resources.
- Co-sponsored CB Beal workshop and sermons (Winter 2023).
- Co-sponsored *Democracy Festival* (May 20, 2023); hosted our own anti-oppression activity and offered a handout on *How to Apologize*.
- Submitted a preliminary report (February 1, 2023) to the Standing Committee with recommendations to help dismantle white supremacy at First Parish.
- Reviewed and delivered (to the Standing Committee) our recommendations for Bylaw revisions.
- Met with the Standing Committee to review our report. (April 11, 2023)

Ongoing COIC Work

- Working to improve accessibility to First Parish pulpit with the addition of railings, an effort led by COIC member Peter Nobile.
- Maintaining a list of FP members who have completed anti-oppression training of any type. (*Waking up White, Beloved Conversations* (both virtual and in person), *Healing Embodied Racism, Transforming Hearts, Jubilee Three*). We hope First Parish will co-sponsor and participate in a Jubilee Three training in the Boston area, currently scheduled for October 2023.
- Determine if any content from the UUA's *Widening the Circle Study Guide* curriculum is relevant to First Parish in Concord.
- Drafting, reviewing, and finalizing an apology for our congregation's role in slavery, colonization, and other acts of oppression. Our goal is congregational adoption at Annual Meeting 2024.
- Create a congregational covenant - vote scheduled Annual Meeting, June 2023. (Two COIC members serve on the Covenanting team.)
- Examining First Parish history vis-a-vis indigenous peoples: include developing a meaningful land acknowledgement, spoken at our services or written in our *Order of Service*.
- Examining and educating our congregation about the history of Concord and First Parish and their role in slavery.
- Expanding our congregation's understanding of the characteristics of white supremacy culture. Planning and co-sponsoring *White Supremacy Teach-in*. (Two COIC members

are working with Rev. Paul Langston-Daley on developing a presentation to be shared with congregants and groups.)

- Sharing articles and information of interest with the wider congregation that inform about diversity, equity, accessibility, and inclusion.
- Maintaining ongoing liaisons with RJAG (Cindy) and Diversity (Dana).
- Partnering with RJAG on goals for common congregational reads, associated with anti-oppression.
- Coordinating our work with related work by the Wright Tavern Legacy Trust.
- Collecting, reviewing and suggesting revisions to key First Parish documents: policies & procedures, hiring guidelines, standard lease, standard contract.
- Educating our congregation about the suggested revisions to Article II of UUA Principles.

Our Recommendations

- Create a new brochure on First Parish's history that acknowledges its involvement in slavery and indigenous peoples' oppression. (A useful model is the North Andover UU church brochure, *Hidden in Plain Site*.)
- Create *Welcoming Walls/Spaces*. Re-decorate the vestibule, central hallways, Parlor, and Parish Hall to fully reflect current First Parish activities, engagement, UU values, and social justice work. Include our commitment to anti-oppression as a central theme. As we continue to celebrate our history, we suggest information about our history and past ministers be fully balanced.
- Install a plaque or other permanent fixture (outside the building and/or inside near entrances) acknowledging our church's past role in harming enslaved and indigenous peoples.
- Devote a full church year to congregation-wide, anti-oppression book reading and discussion, where multiple services coordinate with those shared readings. Guest speakers/authors might be invited, with events open to the public. Books might include: *My Grandmother's Hands*, *The Warmth of Other Suns*, *White Fragility*, *American Holocaust: The Conquest of the New World*, *How to Be An Anti-Racist*, *The Color of Law*, *Biased*, others.
- Increase parishioner participation in anti-oppression trainings: *Beloved Conversations*, *Jubilee Three Training*, *Transforming Hearts*, *Healing Embodied Racism*.
- Offer congregation-wide training in conflict management.
- Offer congregation-wide training on microaggressions.
- Offer congregation-wide training on intersectionality.
- Share the UUA's own history of reckoning with DEAI by screening *The Wilderness Journey* movie.
- Revisit the First Parish mission statement to see if the congregation wants to change/add to reflect our congregation's anti-oppression efforts.
- Eliminate, simplify, or reduce reliance on the formality inherent in using *Robert's Rules of Order* at church meetings. Prioritize the welcoming of different voices instead.
- Study whether any portion of the land we claimed from indigenous people can be returned to its original state.

- Solicit media coverage of First Parish’s anti-oppression actions, locally and nationally, as a possible model for other churches and groups.

Operational Recommendations

- In choosing material for worship services, include more voices from marginalized groups (i.e. indigenous people, Black Americans, Latinx people, people with disabilities, others). *Voices from the Margins* is a good resource.
- Expand the connection between worship and congregational social justice work. Include relevant groups and committees in worship planning and increase lay participation and/or references to their social justice work in services.
- Review congregation-wide social justice efforts and continue restructuring to facilitate cooperative work and eliminate or reduce redundancy (Diversity, RJAG, Immigration Justice Task Force, etc.).

Conchords

Members: Rick Moore (leader), Larry Gall, Lauren Evans, Olof Johnson III, Rex Morrill, Pamela Schweppe

The Conchords are a mixed a cappella vocal ensemble based out of First Parish in Concord. Five members sing regularly with the First Parish adult choir. In April 2023, a sixth member joined the ensemble.

In 2022/2023, the Conchords provided musical leadership for these worship services at First Parish:

- July 24, 2022: Sunday service anthems and leadership of hymns
- December 24, 2022: Christmas Eve anthem for the 9:00 service
- February 19, 2023: Sunday service anthems and leadership of hymns

In addition, the Conchords provided musical entertainment for the following special events at the church:

- September 11, 2022: Homecoming picnic
- April 1, 2023: Talent show

The group served the wider community during the fiscal year through these performances:

- June 25, 2022: Carlisle Old Home Days
- July 22, 2022: Concord Park Senior Living in Concord
- July 29, 2022: RiverMead LifeCare Community in Peterborough, NH
- December 18, 2022: Concord Park
- February 2, 2023: RiverMead

An additional Christmas performance at RiverMead was scheduled but canceled at the last minute due to COVID-19.

The group started the fiscal year with a balance of \$1,393 and ended with a balance of \$1,106. Over the course of the fiscal year, the group received performance donations of \$775, paid \$662 for rehearsal accompaniment, and donated \$400 to the music reserve fund.

The Conchords are grateful for the rehearsal space at First Parish and for the able assistance of rehearsal accompanist Grace Choi. We look forward to singing together in rehearsal, in worship, and in service to the wider community during the year ahead.

Congregational Life Committee (CLC)

Members: Jan Power (chair), Lillian Anderson, Sara Ballard, Jeff Clanon, Teresa Hubscher-Younger

For the 2022-2023 church year, the CLC concentrated its efforts primarily on:

- Rebuilding the church's welcoming and membership programs
- Conducting community-building activities

The activities listed below include those that have been initiated and operated through May of this church year or are planned for June 2023. CLC members conducted the activities in conjunction with staff, other First Parish committees, and volunteers.

Welcoming & Membership Programs:

- Reviewed and set priorities for W&M program elements to be developed during the year
- Set up and maintained welcome table in church vestibule for Sundays (table was staffed weekly by standing committee members on a rotating basis)
- Staffed a welcome table at coffee hour (table staffed by standing committee members)
- Followed up with newcomers who had signed the "send me information" clipboard at Sunday welcome table, submitted a connection card, or whose name came in otherwise to First Parish
- Ran a Welcome/Re-welcome class in fall 2022 for newcomers to First Parish and offered one for spring 2023 (no takers)
- Provided Zoom chat hosting services for Sunday services, Radical Inclusion workshop (March 2023), and annual meeting (June 2023)
- Participated in welcoming new members at their signing of the membership book
- Assembled packets of materials for new members to receive at book signing
- Worked with staff to update the New Member Form to be more inclusive, gather more pertinent information

Community-building activities:

- Organized and hosted December all-church Celebration of Lights event at First Parish
- Organized and managed process for creating next First Parish photo directory
- Organized and co-led volunteer recognition ceremony (5/21/23)
- Organized and led new member recognition ceremony during Sunday service (6/4/23)

- Planned for community events to be organized for 2023-2024 church
- Co-sponsored Radical Inclusion workshop (March 2023)

Communications:

- Worked with staff to update and facilitate process for committees to add content to their First Parish website pages

Committee re-organization:

- Worked with standing committee and staff to determine who would lead new membership team (committee); determined that Membership Team would be a subcommittee of the CLC
- Re-organized the CLC to be better positioned to manage teams (welcoming & membership; events; others); clarified role of CLC members under the new set-up

Ferry Beach Committee

Our annual Ferry Beach weekend was held as an unofficial retreat Memorial Day Weekend, May 26-29, 2023 at the Ferry Beach Camp & Conference Center in Saco, Maine. Due to continuing safety concerns surrounding the COVID-19 pandemic, Ferry Beach again offered to reserve that weekend for folks from our two congregations to book spending the weekend there directly through their office, so there would be individuals and families just from our two congregations, with number and safety restrictions required by Ferry Beach and the state of Maine. There was some organizing on the part of the committee, but not as fully as in pre-pandemic years. Those who attended were there on their own, but with the added benefit of having others from our congregations there at the same time.

We had 115 people attend and that included families with young and older children, couples and adults of all ages, about the same as last year. Most were from First Parish in Concord, but a number from First Parish in Lexington as well. We had a few who were first time “Beachers” this year. The weather was the best in many years with summer-like days Friday through Sunday! Monday was cooler but still beautiful. Much time was spent enjoying the beach, plus the croquet tournament, the porches, the annual talent show, and board games, card games, and conversations in the evenings. All were pleased that the food was much improved over last year. Though the numbers are still much lower than in pre-pandemic years, 115 felt very good to us this year.

We very much hope that we’ll be able to plan normally for our traditional style of Ferry Beach Retreat next year!

Darien Smith, chair for Concord, plans to continue in that role next year. Many signed members of First Parish continue to participate in this event, with 5 of them being: Darien Smith, Lillian Anderson, Susan See, Sara Ballard, and Bozena Smith.

Respectfully submitted,
Darien Smith

First Tuesday Group

Steering Committee: Anne Fortier (co-chair), Nancy McJennett (co-chair), Linda Benua, Mary Clarke, Jack Nevison, and Margie King Saphier.

The First Tuesday group met on the first Tuesday of each month, including in July, August, and September, for outdoor “catch up” meetings, a practice introduced during the height of Covid. Between October 2022 and June 2023, meetings were held hybrid-style, both in-person and via Zoom.

Topics ranged from Kate Dike Blair’s talk about her historical novel, *The Hawthorne Inheritance*, to a showing of artist Sarah Ford Terrey’s film, *Georgia & Me*.

Because of declining attendance and leadership, First Tuesday will be concluding further meetings and programs for First Parish seniors and friends. Anne Fortier will remain as chair, and the group will continue to host the December Holiday party and the June Ice-Cream Social.

Flower Committee

Members: Ellen Whitney (chair), Susan Ellsworth, Dinny McIntyre, Donna Peterson, Joy Madden, Petra Betts, Marty Wallace, Linda Reynolds, Faxon Green, Ginger Lang and Kathy Spang

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 second Thursday of September, January and May to plan arrangements for the following season.

'22 – '23 Highlights:

Activities:

- provided seasonal flower arrangements for weekly Sunday services - decorated the Sanctuary for Christmas and Easter
- installed and maintained the planters in the front of the church
- raised funds for flower purchases through the memorial poinsettia fundraiser
- raised additional funds through a plant sale in September
- coordinated the purchase of poinsettia and lilies for Pastoral Care
- presented a flower arranging workshop at the March Women's Retreat
- donated \$1000 to First Parish's general fund

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

Members: Peter Lowitt (chair), Brad Hubbard-Nelson, Ted Bayne, Kel Keleher, Michael McAteer, Bruce Davidson, Regina Corrao, Rick Moore, Irl Smith, and liaison to the Trustees of Parish Donations and the Wright Tavern Legacy Trust Roselyn Romberg

The UUA 7th principle reads: Respect for the Interdependent Web of All Existence of Which We Are a Part. Following this principle, First Parish became a certified green sanctuary, installed a rooftop solar array, committed to climate justice, and voted to divest from fossil fuels. The Standing Committee charged the Greening the Campus Task Force with advising it and the Senior Minister on how to reduce and eventually eliminate fossil fuels, to develop a plan for fundraising and execute an engineering design study to achieve that goal along with developing a pro forma, cost estimates and identifying funding sources for doing so.

The Task Force is pleased to report the following achievements:

- The Sanctuary is now insulated to modern standards.
- A blower-door and Infrared-scan test now identifies remaining building efficiency flaws.
- The Trustees are insulating all four of the cottages (R-13 walls/R-32 ceilings).
- The Trustees are replacing leaky cottage windows with energy efficient ones.
- First Parish has contracted with LN Consulting, a Vermont firm, to design a Geothermal HVAC system to get us off of fossil fuels. This design permits FP to solicit project bids.
- First Parish has retained Nashawtuc Architects to resolve Historic District Commission issues and assist with internal HVAC system layout.

- FP has engaged a building commissioning agent, DMI, to be responsible for assuring that installed systems are tested to work as designed. DMI has reviewed the LN design specifications as part of their remit.
- A Geothermal test well was drilled that confirms excess heating capacity, letting us consider campus-wide heating and cooling (Wright Tavern and cottages).
- Removable plastic interior storm window inserts have been purchased and installed. Some are currently in storage and will be redeployed when cold weather returns in the late fall.
- The task force identified a direct 30% incentive (reimbursement) for the proposed geothermal installation.

The Task Force is preparing specifications and bid documents to secure pricing to present to the congregation in the fall. The work will include installing a campus-wide geothermal system separated out by its component buildings, completing the insulation of the Parlor Hall and Chapel attics and walls, and replacing the natural gas-fired kitchen stove with an electric induction cooktop and a convection oven.

The task force, in furtherance of its charge, will bring the bid information to the congregation to request permission to begin fundraising and seek input on the timing for doing so.

Humanist Council

Members: Andy Puchrik (chair), Pamela Dritt, Linda Reynolds, Franklin Davis, Petra Betts

The Humanist Council was formed in January 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 603 members on our Concord Area Humanists Announcements mailing list. Andy Puchrik has been the 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. Here are the titles of the past year's talks:

- Strangers in the Night: A firefly love story
- Electric Vehicles: Saving Our Planet
- The History of Ukraine
- The Neuroscience of Bias and Prejudice – Making the Implicit More Explicit

- Native American Sacred Geography
- Wealth, Cost, and Price in American Higher Education, 1870s - 2020s
- Green Our Heating and Cooling
- Everyday Chemicals That May Affect Our Health
- Citizenship in the 21st Century: From Horace Mann to Democracy Prep Public Schools (and beyond)
- Climate Crisis or Clean Green Electric Future?
- Reflections on US Jews and Israel: So much love and so much unhappiness

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

Microfinance Group

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

As of May 3, 2023, First Parish has donated a total of \$3,802 toward KIVA.org microloans. Those funds (along with accruing repayments from previous loans) have been used to make a total of 742 separate loans to individuals in 51 countries, totaling \$19,205.

In addition, we have donated an average of \$.76 per loan to KIVA.org toward overhead costs.

We hope next year to once again *Share the Plate* so we can offer more microloans.

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).

Photography Club

Photo Club Management Team: Fred Van Deusen (chair), Kathleen Elcox, Martin Rindlisbacher, Sallie Satterthwait, Pamela Dritt, Jim Pazaris, Barbara Olson

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 had a couple of hybrid meetings where we met both in person and on Zoom, but in-person attendance did not justify the extra effort involved. Zoom meetings have the added benefit of being available all over the country, thus reconnecting us with former members who have moved.

We decided not to conduct our in-person Annual Exhibit this year, but we did compile our annual slideshow and hung our framed photos in the Parish Hall in May.

The Club's Funding in the past came from member contributions of \$2.00 per person per meeting. This was used to pay for Club expenses and to reimburse First Parish for meeting room usage. Now that we are having Zoom meetings, we are no longer collecting these contributions or making the donation to First Parish.

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 also share a few photos at the beginning of the meeting.

Tutorials: Using Google Drive to store and display photos, Using LightRoom Part 1, Using LightRoom Part 2.

Themes: Spring, Fall Foliage, Favorite Holiday Photos, Black & White, Reflections, Patterns and Lines, Animals and Critters, October Farm Calendar Photo Selection, Favorite Photos of Locations You Visit Frequently.

Slideshows: Annual Members Exhibit, Portugal 1 and 2, Gornergrat - Zermatt Switzerland, Walking Tour of Northwest Ireland, Downeast Maine, Old Frog Pond Farm Art Sculpture Walk

Field Trips: Bare Hill Pond in September, October Farm in May

Technology: Early in 2023 we began experimenting using Google Drive to store our Photo Club documents and photos. The benefits of doing this are to give access to all club members to the photos we have taken, and to enable us to show them using a consistent technology. The biggest downside is that it is a new technology that most club members are not familiar with, and are having difficulty using it.

Report submitted by [Fred Van Deusen](#)

Tibetan Buddhist Group

Members: Kathleen Mayer (chair) kathymayer99@aol.com, Veronica Brandstrader vbrandst@gmail.com, Don Seckler seckler01@comcast.net, Bill Seaver bill.seaver@gmail.com, Dana Snyder-Grant, Diana Lyman, Kathleen Sullivan, Paula Charles, Deb Belguendouz, Helga (Mikki) Volkema. ~15 attend weekly out of a base of over 70. *Several UUs from other congregations are members

Activities:

The Tibetan Buddhist Group meets Wednesday morning (Zoom only) or Thursday evening (Zoom + one in person meeting at First Parish each month). The group presents an opportunity for the beginner as well as more experienced students/practitioners to learn about Buddhist teachings. Those who are more familiar with Buddhism will find the group a chance to further understand and deepen their knowledge and spirituality.

A typical gathering starts with conversation followed by a 30 minute meditation session. For the second half, the group reads from one of the books the group has selected to study. There is time to discuss the content of the reading during this time.

The group reads a variety of books by contemporary as well as classic Buddhist teachers. This offers attendees a rich opportunity to learn about Buddhism from a variety of voices and perspectives.

Sometimes a video will be shared with the group instead of reading. The meetings ends with traditional Buddhist prayers.

Once a month, a Buddhist teacher joins the group and leads the session. He is able to answer questions about Buddhism, and leads the group through a guided meditation.

We host some social events. Past events include brunches, a movie night, or a backyard gathering, and walking meditations. We also share information about upcoming retreats and Buddhist events.

An important part of the Buddhist group is to apply what we have learned to our daily lives.

Transcendentalism Council

Steering Committee Members: Shelley Hawks (chair) Shelley_Hawks@msn.com, Dianne Weiss diannemcweiss@comcast.net, Victor Curran vacurran@comcast.net, Jim Sherblom jimsherblom@gmail.com, Carolina Maciel carolmac.writes@gmail.com

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 in-person lectures and webinars; recordings of our programs are archived on our YouTube page. Our mailing list is 234 people; During 2022-23, more than 260 people registered on Eventbrite for our programs plus numerous walk-ins at live events. All are welcome to join the Council.

Report of activities for 2022-23:

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

Saturday, September 24, 2022, webinar

Sandra Harbert Petrulionis

Emerson seems to have Arrived: The Reform Network of Mary Merrick Brooks

Historian Sandra Harbert Petrulionis explained the significance of Brooks in encouraging Emerson to become more vocal and decisive in his support of the antislavery movement.

Saturday, October 22, 2022, virtual event, pre-recorded at First Parish

David Hackett Fischer

African Founders: How Enslaved People Expanded American Ideals

Historian David Hackett Fischer shared his life experience and addressed the rationale behind his monumental book of the same title.

Free event offered as part of the Concord Festival of Authors

Monday, November 14, 2022, webinar

Sarah Ann Wider

Caroline Sturgis Tappan and the Questioner's Art

Historian Sarah Ann Wider introduced sketches by Caroline Sturgis Tappan and described the creative thinking of this member of Margaret Fuller and Emerson's circle of friends.

Monday, December 5, 2022, webinar

Richard Smith

Thomas Wentworth Higginson Bicentennial Commemoration

Historian Richard Smith highlighted the impact of Thomas Wentworth Higginson on the antislavery movement, his discovery of Emily Dickinson, and his biography of Margaret Fuller.

Saturday, March 18, 2023, in-person event at Parish Hall

Stephen Collins

An Evening with Robert Frost

Actor and educator Stephen Collins brought this Emerson-influenced, twentieth-century poet to life in a performance interspersed with readings of Frost's poetry.

Tuesday, April 25, 2023, webinar

Laura Dassow Walls

Barry Lopez: A Thoreau for our Time

Biographer Laura Dassow Walls gave an exciting glimpse into her work-in-progress on Barry Lopez (1945-2020), whom she calls “a Thoreau for our time.”

Tuesday, May 16, 2023, webinar

Julie Dobrow

The Transcendentalists’ Call: Mabel Loomis Todd, the Thoreaus, and Emily Dickinson

Biographer Julie Dobrow highlighted the Thoreau family’s influence on Mabel Loomis Todd (1856-1932), editor of Emily Dickinson’s poetry and civic activist.

Our Facebook page features notices of upcoming programs and events, plus historical highlights about the Transcendentalists, Concord, and First Parish. Link here:

<https://www.facebook.com/profile.php?id=100064840352280>

Since 2022, we have maintained a YouTube channel for the Transcendentalism Council of First Parish in Concord. Recordings of our past programs on Zoom or live stream are accessible at this link:

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

In January 2023, our group facilitated reservations for the Emerson Reading Circle chaired by Charles Phillips. The group meets monthly every second Wednesday in the Ellen Emerson Room to read aloud and discuss works by Ralph Waldo Emerson. It is open to all.

Transition Team

Members: Eric Moore (chair), Mary Ann Barton, Doug Hardy, Carol Harris, Mary Rocheleau

Our congregation is on a journey from Howard Dana’s ministry, through Seth Carrier-Ladd’s interim ministry, to what we embrace as “next.” Five of us were asked by the Standing Committee to work with Rev. Seth as a Transition Team to support our congregation’s reflection through this interim period. Transition Teams are a frequent working group under UU interim ministries.

Our work started in November ’22. We are: Mary Ann Barton, Doug Hardy, Carol Harris, Eric Moore, and Mary Rocheleau. More about the team is at <https://firstparish.org/wp/first-parish-transition-team/>.

In February, the Transition Team hosted two “Ritual of Release” events to allow us to share our feelings about and experiences of Howard Dana’s ministry. In April, The Transition Team hosted two “First Parish Life Stories” events to create a shared narrative of our church’s history. Together we reflected on several questions: What brought you here? Why did you stay? What were the most important events during your time here? We plan to communicate more with the members of our congregation to understand our diverse relationships to our First Parish community.

Throughout the coming year, the Transition Team expects to coordinate with the work of the Covenant Team, the Search Committee, the Standing Committee, and other groups to support our congregation in understanding the health of our institution and in thoughtfully articulating our identity as a congregation looking forward.

Women's AM/PM Book Group

Facilitators: Darien Smith, Siri Smedvig

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.

2022-2023 was the 31st 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 variable pandemic conditions, discussions were held via Zoom and generally had 8-12 participants. However, we were able to hold our Book Choosing event in June as a multi-platform session that worked well using the large screen in the Brooks Room. We had 5 attend online and 12 in person.

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

Sept	<i>The Lincoln Highway</i> , Amor Towles – F
Oct	<i>The Library Book</i> , Susan Orlean – NF
Nov/Dec	<i>These Precious Days: Essays</i> , Ann Patchett – NF
Jan	<i>Deacon King Kong</i> , James McBride – F
Feb	<i>West with Giraffes</i> , Lynda Rutledge – F
Mar	<i>The Four Winds</i> , Kristin Hannah – F
April	<i>All That She Carried: The Journey of Ashley's Sack, a Black Family Keepsake</i> , Tiya Miles - NF
May	<i>The Hawk's Way: Encounters with Fierce Beauty</i> , Sy Montgomery - NF

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 novels *The Lincoln Highway* and *West with Giraffes*. Both were books about road trips in an earlier time and the latter was based on a true story during The Great Depression.

Books are chosen in June of each year at a single event for both the morning and evening groups. 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.

The Women's AM/PM Book Group looks forward to its 32nd year in 2023-2024, and we plan to have multi-platform meetings.

Darien and Siri will be continuing as facilitators.

The Book Group continues to have many signed members of First Parish participating, and 5 of them are: Darien Smith, Siri Smedvig, Patty Keane, Susan See, and Bozena Smith

Respectfully submitted,
Darien Smith

Women's Goddess Covenant Circle

Members: Darien Smith (chair), Bozena Smith, Susan See, Suzanne Foley, Suzie Weaver

Our group of thirteen women continues to meet two or three times a month in person or on Zoom to explore earth-based spirituality and the feminine divine and to forge deeper connections with one another as women. We welcome new members. We also helped create the Winter Lights event at First Parish in December of 2022.

Women's Parish Association (WPA)

Members: Marilyn Lowitt and Dian Pekin (Interim Co-Presidents), Janet Bailey, Carol Boris, Irmi Doane, Lauren Evans, Priscilla Smith, Lois Suarez, Melita Teichert, Lois Whitney

The Women's Parish Association has had a very productive year. 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 and we have continued to support various facilities and program needs of First Parish in Concord.

We have also continued our financial and planning support to First Parish's landscaping needs 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. We extend very special thanks to Bruce Davidson, Doug Baker and Barry Copp for their recent work to upgrade the Herb Garden with newly installed bed-defining planks and improved pathways throughout the garden's interesting components. We urge you to give yourself a summertime treat and spend some time in our lovely gardens.

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 Mary King for her coordination of this project. Dian Pekin is a member of the First Parish Environmental Action Team and keeps the WPA informed of opportunities to promote their various programs, such as Bill McKibben's latest Concord lecture.

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 sold sunflower seed packets to raise funds for Ukrainian refugees. In addition to providing funds to the International Institute of New England, the WPA also sponsored the IINT to be a Share the Plate Recipient during the month of January which enabled the IINT to receive additional funds collected from Sunday morning collections.

The WPA has supported the Greeley Scholar for Peace Studies Lecture over the years. This year, the multi-platform lecture was given by Dayamani Barla, the 2023 Greeley Scholar for Peace on April 16 at 2:00 p.m. in the Parish Hall of First Parish followed by a reception featuring Indian chai and food. In addition to the WPA, the following First Parish committees supported this event: First Parish in Concord's Environmental Team and the Racial Justice Action Group in cooperation with the UMass Lowell and the Greeley Scholar for Peace Program. The WPA extends heartfelt thanks to these organizations for their support of this well attended event. Members of the late Rev. Dana Greeley's family attended the lecture and reception and were very pleased to meet this year's Scholar For Peace.

Ms. Barla's activism is located at the intersections of environmental justice, gender justice, and Adivasi (indigenous) people's right to self-determination. Over several decades, she has led Adivasi resistance against dams/hydroelectric power projects and steel plants that displace Adivasi people and destroy forests that are integral to Adivasi people's survival and sustenance. She has also been incarcerated for leading a successful movement against setting up of a steel project by global conglomerate Arcelor-Mittal. This struggle is considered one of the longest and most successful anti-dam movements in India and is rooted in the highly mobilized Munda Indigenous community.

For over 60 years, the WPA has participated with other faith communities in Concord's commemoration of the annual World Day of Prayer each year on the first Friday in March. Due to ongoing Covid-19 concerns, the Concord World Day of Prayer Committee held a reduced commemoration this year. The service was written by women of Taiwan. Informed prayers, prayerful action and thoughtful fundraising are all part of each year's commemoration and prayer service. Next year, the women of Palestine will write the prayer service and provide information about people's needs. The theme of next year's service will be, "I Beg You... Bear With One Another in Love."

Our fundraising programs included the popular sales of catnip balls during the holiday season and its Artisan Fair sales. This past year, the WPA held two Artisans Fairs, both of which were held outdoors on the front grounds of the church. The Summer Artisans Fair took place on June 25th from 10 a.m. to 4 p.m. and the Holiday Artisans Fair took place on October 8th. The front grounds of First Parish were filled with ongoing favorite and new artists, photographers, artisans, crafters, artisan food vendors and horticulturists who showcased and sold their latest creations. The vast array of artisans' tents displayed on the front grounds along with live dulcimer music provided for a very festive and fun time for the vendors, shoppers, and volunteer workers. The WPA Boutique, which provided curated donated items along with Christmas decorations were welcome components of the Holiday Artisans Fair. These fundraising activities enabled the WPA to reach its goals of continued support for its charities and support of First Parish. Many thanks to all the volunteer workers who made these events possible! And special thanks to all those who made the creatively designed catnip balls.

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 are also planning to hold indoor activities of interest during the cooler months.

The WPA Board members took a break from their busy schedule and added special joy to their holiday season by attending a gallery talk and tour of the Elizabeth Wentworth Roberts Exhibit at the Concord Art Association to honor the founder of the Concord Art Association. First Parish owns two of Ms. Roberts' paintings that depict women sewing clothing for WWI refugees. These paintings are two of a total of ten similar paintings that were sold to raise money for refugee aid. It was wonderful to see our paintings join some other members of this special collection. It should be noted that not all of the ten paintings have been found.

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.

We extend heartfelt thanks to fellow members of our Board: Treasurer, Lauren Evans; Recording Secretary, Irmi Doane; Corresponding Secretary, Marilyn Lowitt; Membership Chair, Lois Whitney; Social Action Liaison, Marilyn Lowitt; Members at Large, Janet Bailey; Carol Boris; Priscilla Smith; Lois Suarez; and Melita Teichert. Also, many thanks to Deb Allen, Linda Benua,

Mary King and Susan Page who left the board this past year. Their service was greatly appreciated. and we look forward to their helping us in future WPA activities.

Many thanks to Facilities Manager Bruce Davidson for all his support to the WPA. 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 Rev. Seth Carrier-Ladd, Rev. Liz Weber, and Rev. Amy Freedman for all their moral support of the WPA. It is greatly appreciated.

We can't close without thanking all those who have given ongoing support to our faith community and to WPA programs and activities. It's been an honor and a pleasure to serve as Interim Co- Presidents of the WPA. May our efforts help bring more justice, peace and joy to all.

Respectfully Submitted,
Marilyn Lowitt and Dian Pekin, Interim Co-Presidents
The Women's Parish Association
First Parish in Concord

Women's Retreats Committee

Members: Lillian Anderson (chair), Bozena Smith, Carolyn Copp, Carol Harris, Karen Kashian

Organized and led a Women's Retreat at First Parish in March 2023 with around 50 women attending.

Financial Reports

Happy news! We ended the year with a **\$40,000 loss, much less than the \$170,000 loss we had budgeted/anticipated**. This has resulted in our ending FY23 with **\$145,858 in surplus funds**, much more than the \$16,000 we had budgeted/anticipated.

Budget: Per the Standing Committee and its Financial Sustainability Subcommittee, we enter FY24 with a balanced budget, with projected net income = \$3,023.

Pledge Campaign: We ended the pledge campaign for FY2023-2024 (FY24: 7/2023-6/2024) with \$971,223 in pledges from 328 pledging households (thank you all!). [But we have room for another pledge. If you or someone you know would like to make a pledge for our 2023-2024 church year, please contact Fifi Ball at fball@firstparish.org.]

Profit and Loss

1:24 PM
07/24/23
Accrual Basis

First Parish in Concord Profit & Loss Budget Performance June 2023

	Jun 23	Jul 22-Jun 23	YTD Budg	\$ Over Budg	Ann'l Budg	Budg Rmng	Notes
Income							
3010 - Contribution Income							
3020 - Current Year Pledge Income	26,082	960,095	940,900	19,195	940,900	(19,195)	Total FY23 pledges budgeted \$970k, reduced 3% to \$940,900 to acct for unpd pledges; actual FY23 pledges = \$971,223; actual pd pledges \$960,095 = 1.1% underpd pledges
3050 - Prior Yr Pledge Payments	0	5,260	19,000	(13,740)	19,000	13,740	
3060 - Offset Credit Card Fees	62	1,324	1,300	24	1,300	(24)	
3110 - Plate Collections	1,361	22,436	24,000	(1,564)	24,000	1,564	
3120 - Share the Plate (pass-through)	1,361	18,742	21,000	(2,258)	21,000	2,258	
3122 - Christmas Eve collection ps-thr	0	5,757	8,000	(2,243)	8,000	2,243	
3124 - Disaster Relief collectn ps-thr	0	781	6,000	(5,219)	6,000	5,219	
3126 - Social Action Gift	0	10,000	10,000	0	10,000	0	
3330 - Gifts	100	106,352	87,000	19,352	87,000	(19,352)	
Total 3010 - Contribution Income	28,966	1,130,747	1,117,200	13,547	1,117,200	(13,547)	
3130 - Users of Facilities	2,802	26,363	21,500	4,863	21,500	(4,863)	
3140 - Trustees Income							
3150 - Trustees of Parish Donations	12,128	145,542	145,536	6	145,536	(6)	
Total 3140 - Trustees Income	12,128	145,542	145,536	6	145,536	(6)	
3185 - Coan House Rental Income	855	21,170	19,200	1,970	19,200	(1,970)	\$800 x 2 x 12 mos = \$19,200; one tenant pd \$1k/mo x 9 mos = \$1,800 add'l; \$170 late fees pd
3350 - Interest Income	15,022	31,377	5,270	26,107	5,270	(26,107)	
3360 - SREC (solar panel) income	0	6,939	8,000	(1,061)	8,000	1,061	
3370 - Miscellaneous Income	600	1,232	400	832	400	(832)	
Total Income	60,373	1,363,370	1,317,106	46,264	1,317,106	(46,264)	

1:24 PM
07/24/23
Accrual Basis

First Parish in Concord
Profit & Loss Budget Performance
June 2023

		Jun 23	Jul 22-Jun 23	YTD Budg	\$ Over Budg	Ann'l Budg	Budg Rmng	Notes
	Expense							
	4010 - Minister Staff							
	4020 - Senior Minister	18,161	170,826	168,008	2,818	168,008	(2,818)	SCL sign-on bonus paid from sal line, budgeted at 7195 Min Moving Exp
	4030 - Minister fr Congregational Care	12,018	91,391	91,391	0	91,391	0	
	4040 - Guest Ministers	2,200	12,725	14,480	(1,755)	14,480	1,755	
	Total 4010 - Minister Staff	32,379	274,942	273,879	1,063	273,879	(1,063)	
	4150 - Minister Development							
	4160 - Senior Minister Prof'l Dev & Exp	2,006	11,740	12,961	(1,221)	12,961	1,221	HD July prof'l exp not used
	4170 - Minister Cong Care Prof'l Exp	5,079	8,490	8,490	0	8,490	0	
	Total 4150 - Minister Development	7,085	20,230	21,451	(1,221)	21,451	1,221	
	4200 - Human Resources							
	4230 - Hiring & Search	75	507	5,500	(4,993)	5,500	4,993	\$5k had been budgeted for Search Team (was \$5k first yr and \$12k second yr last time), but none used
	Total 4200 - Human Resources	75	507	5,500	(4,993)	5,500	4,993	
	4300 - Professional Development							
	4310 - Staff Professional Development	2,854	3,438	5,500	(2,062)	5,500	2,062	
	Total 4300 - Professional Development	2,854	3,438	5,500	(2,062)	5,500	2,062	
	4400 - HR Benefits and Taxes							
	4410 - Social Security Taxes (FICA)	4,182	32,005	37,036	(5,031)	37,036	5,031	All underspent, partially Church Admin position
	4450 - Retirement Plan	8,930	70,859	76,041	(5,182)	76,041	5,182	All underspent, partially Church Admin position
	4460 - UUA Group Insurance	876	10,061	15,642	(5,581)	15,642	5,581	All underspent, partially Church Admin position
	4470 - Health Insurance	4,642	62,438	64,827	(2,389)	64,827	2,389	All underspent, partially Church Admin position
	4490 - Staff Bonuses	0	5,000	0	5,000	0	(5,000)	
	Total 4400 - HR Benefits and Taxes	18,630	180,363	193,546	(13,183)	193,546	13,183	
	4500 - Parish Activities							
	4510 - Worship Aesthetics	30	358	100	258	100	(258)	
	4530 - Coffee Hour / FP Cafe	689	2,790	3,300	(510)	3,300	510	

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Accrual Basis

First Parish in Concord
Profit & Loss Budget Performance
June 2023

		Jun 23	Jul 22-Jun 23	YTD Budg	\$ Over Budg	Ann'l Budg	Budg Rmng	Notes
	4550 · Pastoral Care	0	227	500	(273)	500	273	
	Total 4500 · Parish Activities	719	3,375	3,900	(525)	3,900	525	
	4700 · Member Services							
	4735 · Congregational Life	0	1,800	5,000	(3,200)	5,000	3,200	
	4750 · Sustaining Membership	0	485	400	85	400	(85)	
	Total 4700 · Member Services	0	2,285	5,400	(3,115)	5,400	3,115	
	4800 · Social Action							
	4827 · UU-Affiliated Organizations	0	10,000	10,000	0	10,000	0	Pass-through, donated to other orgs
								FY23 \$1,875/mo actual vs \$2,100/mo budget x 10 mos; sometimes suppl by SAC Reserve; down from past yrs avgs FY19 \$3,130/mo; FY20 \$1,736/mo; FY21 \$2,607/mo; FY22 \$2,234/mo
	4830 · Share the Plate to recipients	2,950	18,742	21,000	(2,258)	21,000	2,258	
	4835 · Christmas Eve distributions	0	5,757	8,000	(2,243)	8,000	2,243	Topped up to \$8k by SAC Reserve
	4840 · Disaster Relief distributions	0	781	6,000	(5,219)	6,000	5,219	UUSC Hurricane Relief topped up to \$1k by SAC Reserve
	4845 · Social Action Participation	0	5,000	5,000	0	5,000	0	
	4860 · Social Action Manager	7,948	60,435	60,435	0	60,435	0	
	4865 · Social Action Manager expenses	1,198	2,500	2,500	0	2,500	0	
	Total 4800 · Social Action	12,096	103,215	112,935	(9,720)	112,935	9,720	
	5000 · Lifespan Religious Education							
	5050 · Religious Education Staff							
	5060 · Youth Programs Leadership	1,400	9,000	9,000	0	9,000	0	
	5075 · Assistant Director of RE	5,236	39,814	39,814	0	39,814	0	
	5080 · Religious Ed Director/Minister	12,018	91,391	91,391	0	91,391	0	
	5082 · Dir/Min RE Prof'l Expenses	2,450	6,099	8,490	(2,391)	8,490	2,391	
	5085 · Retreat Overnight Stipends	0	240	600	(360)	600	360	
	Total 5050 · Religious Education Staff	21,104	146,544	149,295	(2,751)	149,295	2,751	
	5150 · Religious Education Operations							
	5160 · Childcare (0-4 yrs.)	375	2,327	4,000	(1,673)	4,000	1,673	
	5205 · OWL (Our Whole Lives) - all	2,000	4,000	4,000	0	4,000	0	

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First Parish in Concord
Profit & Loss Budget Performance
June 2023

		Jun 23	Jul 22-Jun 23	YTD Budg	\$ Over Budg	Ann'l Budg	Budg Rmng	Notes
	5215 - RE Special Guests	330	450	500	(50)	500	50	
	5220 - Coming of Age - 9th grade	21	278	0	278	0	(278)	
	5240 - Sr. High Youth Group	72	178	250	(72)	250	72	
	5295 - RE Supplies & Appreciation	948	2,039	2,000	39	2,000	(39)	
	Total 5150 - Religious Education Operations	3,746	9,272	10,750	(1,478)	10,750	1,478	
	Total 5000 - Lifespan Religious Education	24,850	155,816	160,045	(4,229)	160,045	4,229	
	5400 - Music							
	5410 - Contract Musicians	0	3,440	3,000	440	3,000	(440)	
	5450 - Music Staff							
	5460 - Music Director	11,198	85,154	85,154	0	85,154	0	
	5470 - Music Director Profit Expenses	700	4,814	8,515	(3,701)	8,515	3,701	
	5480 - Organist	2,750	20,908	20,908	0	20,908	0	
	5482 - Guest Organists/Accompanist	1,648	11,454	13,000	(1,546)	13,000	1,546	
	5486 - Gospel Ensemble Director	1,434	10,901	10,924	(23)	10,924	23	
	5487 - Children's Choir Director	1,666	10,404	10,404	0	10,404	0	
	Total 5450 - Music Staff	19,396	143,635	148,905	(5,270)	148,905	5,270	
	5510 - Music and Material	90	3,164	4,000	(836)	4,000	836	
	5530 - Instrument Maintenance	1,100	6,420	6,000	420	6,000	(420)	
	Total 5400 - Music	20,586	156,659	161,905	(5,246)	161,905	5,246	
	5600 - Administration							
	5700 - Administration Operations							
	5710 - Telephone Services	264	3,833	4,200	(367)	4,200	367	
	5730 - Office Supplies	0	2,482	3,200	(718)	3,200	718	
	5740 - Technology and Equipment	2,159	18,343	14,500	3,843	14,500	(3,843)	\$4,250 eTap; \$1,642 website hosting; \$160 Acrobat purchasing error; \$3,011 AV; \$1,300 Brooks Rm setup; \$1k OWL; \$192 MailChimp; \$585 various staff upgrades/replacements; \$306 phone system repair; \$1,566 MS 365; \$420 Adobe Acrobat Pro for staff; \$2,365 Zoom; \$1,540 tech support; \$50 RemotePC lic renew

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First Parish in Concord
Profit & Loss Budget Performance
June 2023

		Jun 23	Jul 22-Jun 23	YTD Budg	\$ Over Budg	Ann'l Budg	Budg Rmng	Notes
	5750 · Publications and Printing	960	1,856	2,400	(544)	2,400	544	
	5770 · Postage	17	2,920	4,000	(1,080)	4,000	1,080	
	5790 · Equipment Leases	696	9,922	10,000	(78)	10,000	78	
	5810 · Payroll Services	228	2,284	2,400	(116)	2,400	116	
	5820 · Cr card, auto debit, stock fees	259	4,066	5,000	(934)	5,000	934	
	5830 · Administrative Misc.	692	2,714	2,000	714	2,000	(714)	Incl \$1,120 med exp reimb after fall on FP property
	Total 5700 · Administration Operations	5,275	48,420	47,700	720	47,700	(720)	
	5900 · Administrative Staff							
	5950 · Director of Finance & Operations	11,165	84,897	84,897	0	84,897	0	
	5960 · Dir Finance & Ops Assistant	4,170	31,704	31,704	0	31,704	0	
	5970 · Church Administrator	6,294	25,355	53,716	(28,361)	53,716	28,361	Savings: pt freelancers vs ft staffer
	Total 5900 · Administrative Staff	21,629	141,956	170,317	(28,361)	170,317	28,361	
	Total 5600 · Administration	26,904	190,376	218,017	(27,641)	218,017	27,641	
	6000 · Property Plant & Equip							
	6050 · Sexton Staff							
	6070 · Sexton	9,577	72,828	72,828	0	72,828	0	
	6110 · Other Maintenance Staff	1,226	9,095	10,400	(1,305)	10,400	1,305	Cleaning moved to 6225 Build Maint
	Total 6050 · Sexton Staff	10,803	81,923	83,228	(1,305)	83,228	1,305	
	6100 · Plant Operations							
	6150 · Fuel Oil	0	28,486	24,000	4,486	24,000	(4,486)	Over annual budget \$4,500 (at least \$3,500 over expected)
	6160 · Utilities	1,224	17,231	13,500	3,731	13,500	(3,731)	Elec/mo ranges \$261-\$1,144 CMLP; pre-covid years were ~\$18k
	6170 · Insurance	717	14,689	17,000	(2,311)	17,000	2,311	
	6190 · Building Supplies	714	6,529	7,000	(471)	7,000	471	
	6210 · Equipment & Furnishings	458	8,173	7,000	1,173	7,000	(1,173)	
	6225 · Building Maintenance	3,383	38,543	26,000	12,543	26,000	(12,543)	Cleaning, more expensive, moved to this line from 6110 Other Maint Staff Jan-June 2023: 26 weeks x 325 = 8450; KONE elevator \$4k over \$4,200 annual maint contract

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First Parish in Concord
Profit & Loss Budget Performance
June 2023

	Jun 23	Jul 22-Jun 23	YTD Budg	\$ Over Budg	Ann'l Budg	Budg Rmng	Notes
6230 · Landscaping & Snow Removal	4,569	19,956	27,000	(7,044)	27,000	7,044	Savings = low snow winter
6235 · Facilities Repair	500	13,051	29,000	(15,949)	29,000	15,949	Incl \$6k tr to savings; approx \$8k in 6225 Maint that could be 6235 Repair
Total 6100 · Plant Operations	11,565	146,658	150,500	(3,842)	150,500	3,842	
6220 · PP&E Additional Expenses	0	3,360	4,000	(640)	4,000	640	
Total 6000 · Property Plant & Equip	22,368	231,941	237,728	(5,787)	237,728	5,787	
7000 · Denominational Support							
7010 · UUA Annual Program Fund	0	72,386	72,386	0	72,386	0	
7040 · Ministerial Intern	0	3,500	4,000	(500)	4,000	500	from Summer Min 2022 pmt timing
7050 · GA Registration	800	2,250	2,500	(250)	2,500	250	FP delegate reimb; staff \$ elsewhere
7080 · PCC Program Support	285	900	900	0	900	0	30th anniv magnets reimbursed
Total 7000 · Denominational Support	1,085	79,036	79,786	(750)	79,786	750	
7150 · Governance and Finance							
7180 · Fundraising Costs	0	1,123	2,500	(1,377)	2,500	1,377	
7195 · Minister Moving Expenses	0	0	5,000	(5,000)	5,000	5,000	\$2,500 pd on Int Sr Min salary line; bal \$2,500 unspent
Total 7150 · Governance and Finance	0	1,123	7,500	(6,377)	7,500	6,377	
Total Expense	169,631	1,403,306	1,487,092	(83,786)	1,487,092	83,786	
Net Income	(109,258)	(39,936)	(169,986)	130,050	(169,986)	(130,050)	

Profit and Loss Short

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Accrual Basis

First Parish in Concord Profit & Loss Budget Performance June 2023

		Jun 23	Jul 22-Jun 23	YTD Budg	\$ Over Budg	Ann'l Budg	Budg Rmng	
	Income							Neg #s =
	3010 · Contribution Income	28,967	1,130,746	1,117,200	13,546	1,117,200	(13,546)	Addl income
	3130 · Users of Facilities	2,802	26,363	21,500	4,863	21,500	(4,863)	Addl income
	3140 · Trustees Income	12,128	145,542	145,536	6	145,536	(6)	Addl income
	3185 · Coan House Rental Income	855	21,170	19,200	1,970	19,200	(1,970)	Addl income
	3350 · Interest Income	15,022	31,377	5,270	26,107	5,270	(26,107)	Addl income
	3360 · SREC (solar panel) income	0	6,939	8,000	(1,061)	8,000	1,061	
	3370 · Miscellaneous Income	600	1,232	400	832	400	(832)	Addl income
	Total Income	60,374	1,363,369	1,317,106	46,263	1,317,106	(46,263)	
	Expense							
	4010 · Minister Staff	32,380	274,942	273,879	1,063	273,879	(1,063)	pos #s =
	4150 · Minister Development	7,085	20,230	21,451	(1,221)	21,451	1,221	spent less than budgeted - HD July unspent
	4200 · Human Resources	75	507	5,500	(4,993)	5,500	4,993	spent less than budgeted - Search Team started FY24
	4300 · Professional Development	2,854	3,438	5,500	(2,062)	5,500	2,062	spent less than budgeted
	4400 · HR Benefits and Taxes	18,631	180,363	193,546	(13,183)	193,546	13,183	spent less than budgeted - some from no Church Admin benefits
	4500 · Parish Activities	719	3,375	3,900	(525)	3,900	525	spent less than budgeted
	4700 · Member Services	0	2,284	5,400	(3,116)	5,400	3,116	spent less than budgeted
	4800 · Social Action	12,096	103,215	112,935	(9,720)	112,935	9,720	spent less than budgeted
	5000 · Lifespan Religious Education	24,850	155,816	160,045	(4,229)	160,045	4,229	spent less than budgeted
	5400 · Music	20,585	156,660	161,905	(5,245)	161,905	5,245	spent less than budgeted
	5600 · Administration	26,904	190,377	218,017	(27,640)	218,017	27,640	spent less than budgeted - mostly no Church Admin
	6000 · Property Plant & Equip	22,368	231,940	237,728	(5,788)	237,728	5,788	spent less than budgeted
	7000 · Denominational Support	1,085	79,036	79,786	(750)	79,786	750	spent less than budgeted
	7150 · Governance and Finance	0	1,123	7,500	(6,377)	7,500	6,377	spent less than budgeted - \$2,500 unspent min moving exp; unspent fundraising \$
	Total Expense	169,632	1,403,306	1,487,092	(83,786)	1,487,092	83,786	
	Net Income	(109,258)	(39,937)	(169,986)	130,049	(169,986)	(130,049)	

Budget Changes

Changes relating to the First Parish FY23 operating budget						6/30/2023
Effective date	Account number	Account name	Approved budget	Change from budget	Approved by SC	Comments
Changes to income lines - zeroes out 6/30, see income statement for actuals						
				-		Anticipated increase (decrease) in <i>income</i> versus budgeted, ignoring pass-throughs
Changes to expense lines - zeroes out 6/30, see income statement for actuals						
				-		Anticipated increase (reduction) in <i>expenses</i> versus budgeted
			Net to date	-		Net increase (decrease) in anticipated net income (<i>income minus expenses</i>)

Balance Sheet

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Accrual Basis

First Parish in Concord Balance Sheet As of June 30, 2023

	Jun 30, 23	May 31, 23	\$ Change	Notes
ASSETS				
Current Assets				
Checking/Savings				
1000 · Cash				
1010 · Petty Cash	145	149	(4)	
1040 · Cash - Cambridge Trust Chk Oper	966,976	1,078,803	(111,827)	MF negotiated 3.5% int eff 1/1/23 both chkg & savgs; high neg # incl net monthly loss \$109,258
1047 · CT Promo Premium Savings II	458,888	457,593	1,295	MF negotiated to 3.5% int eff 1/1/23
1057 · Fidelity 1	279,298	273,288	6,010	Money mkt, interest 1/4ly > 4% = \$2,161 Dec 2022, missed Mar 2023, taking both 1/4s June 2023, 4.1% and 4.65% respective 1/4s
1058 · Fidelity 2	219,843	215,112	4,731	Money mkt, interest 1/4ly > 4% - \$1,701 Dec 2022, missed Mar 2023, taking both 1/4s June 2023, 4.1% and 4.65% respective 1/4s
Total 1000 · Cash	1,925,150	2,024,945	(99,795)	
Total Checking/Savings	1,925,150	2,024,945	(99,795)	
Accounts Receivable				
1200 · Accounts Receivable	138	338	(200)	
Total Accounts Receivable	138	338	(200)	
Other Current Assets				
1300 · Suspense	(800,633)	(797,775)	(2,858)	Mostly \$ from PG estate destined for investment fund
1350 · Prepaid Expense/Deferred Income	29,549	3,372	26,177	In June for FY24: \$5.7k health ins + \$18.5k basic ins + misc
1499 · Undeposited Funds	38,567	0	38,567	June deps reconciled after 6/30
Total Other Current Assets	(732,517)	(794,403)	61,886	
Total Current Assets	1,192,771	1,230,880	(38,109)	
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	5,558,271	5,596,380	(38,109)	
LIABILITIES & EQUITY				
Liabilities				
Current Liabilities				
Accounts Payable				
2010 · Accounts Payable	2,396	0	2,396	Employer ret plan contribs thru 6/30 pd July pulled back into June
Total Accounts Payable	2,396	0	2,396	

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Accrual Basis

First Parish in Concord
Balance Sheet
As of June 30, 2023

	Jun 30, 23	May 31, 23	\$ Change	Notes
Credit Cards				
2012 · Credit Card - Cambridge Trust	7,585	6,254	1,331	
Total Credit Cards	7,585	6,254	1,331	
Other Current Liabilities				
2025 · Unearned Subscriptions Next FY	353,300	320,677	32,623	More prepd pledges, most FY24
2026 · Offset Credit Card Fees Next FY	25	24	1	
2100 · Accrued Payroll	11,522	0	11,522	Cuts off Fri June 30, FY24 payroll starts Sat July 1—splits pay period pd in July
2140 · Mission Funds				
2150 · Music Funds				
2170 · Music Reserve	4,615	4,615	0	
2180 · Music Events	3,601	3,601	0	
2190 · Organ Fund	15,501	15,301	200	Monthly transfer in
2195 · Audio Video Upgrade Fund	3,318	(17,682)	21,000	Down pmt \$33,300 in May went negative; donations in June made bal positive
Total 2150 · Music Funds	27,035	5,835	21,200	
2200 · Social Action Funds				
2235 · AWE - Advocates for Women's	796	796	0	
2240 · Environmental Team/Green Sar	560	560	0	
2242 · Greening the FP Campus	69,468	69,468	0	
2245 · Diversity Committee	572	572	0	
2255 · Racial Justice Action Group	28	28	0	
2280 · Reclaim Our Democracy	88	88	0	
2296 · SAC Reserve Fund (fka Grants)	48,338	53,041	(4,703)	Overflow fr 4845 SA Participation FY23 inc stmt budget line
Total 2200 · Social Action Funds	119,850	124,553	(4,703)	
2400 · RE / Youth Funds				
2230 · Bird Childrens Fund	235	235	0	
2430 · Youth Activities Fund	10,421	10,421	0	
Total 2400 · RE / Youth Funds	10,656	10,656	0	
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	162,837	146,340	16,497	
2800 · Special Programs				
2820 · Flower Committee Fund	1,740	1,740	0	
2825 · The Conchords	806	906	(100)	
2830 · Retreats	1,667	3,602	(1,935)	Women's Retreat down pmt
2835 · Photo Club Fund	802	802	0	
2855 · Humanist Council	4,000	4,000	0	

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Accrual Basis

First Parish in Concord
Balance Sheet
As of June 30, 2023

	Jun 30, 23	May 31, 23	\$ Change	Notes
2894 · PCC U & I Kristoffy Mem'l Fund	685	685	0	
2896 · PCC Student Sponsorship	3,866	3,866	0	
2897 · PCC Pilgrimage Operating	8,400	0	8,400	\$700/ ground expenses from 12 travelers for 9/20-10/2/23 trip to Transylvania
2898 · PCC Pilgrimage Assistance	2,033	2,033	0	
2899 · PCC Val Holt Partnership Fund	944	1,031	(87)	Kopjafa pole refurb
2935 · Transcendentalism Council Fund	3,700	3,700	0	
Total 2800 · Special Programs	28,643	22,365	6,278	
2950 · Reserve Accounts				
2965 · Gary Smith Fund Minstrl Interns	27,720	27,720	0	
2975 · Simmons Restricted Gift	270,000	270,000	0	
2990 · L-T Facilities Maintenance	34,276	33,776	500	Monthly transfer in
2950 · Reserve Accounts - Other	(100)	(100)	0	Miscategorized; s/b SAC Reserve; correctly by JE in Aug 2023
Total 2950 · Reserve Accounts	331,896	331,396	500	
Total Other Current Liabilities	888,223	820,802	67,421	
Total Current Liabilities	898,204	827,056	71,148	
Total Liabilities	898,204	827,056	71,148	
Equity				
3900 · Retained Earnings	394,500	394,500	0	
3910 · Building / Organ Equity	4,305,503	4,305,503	0	
Net Income	(39,937)	69,320	(109,257)	Difference = monthly net income
Total Equity	4,660,066	4,769,323	(109,257)	Matches P&L /mo bottom line
TOTAL LIABILITIES & EQUITY	5,558,270	5,596,379	(38,109)	

Trustees of Parish Donations
Annual Report
Fiscal Year Ended June 30, 2023

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 2023 the Trustees carried out this mission as described below:

- Fiscal 2024 Contribution -- For fiscal 2024 the Trustees have determined that it is prudent and appropriate to contribute \$256,458 in support of First Parish. This represents an increase of roughly \$112,000 above the 2023 contribution of \$144,341. This large increase was the result of the Trustees unanimously supporting a request from Rev. Seth Carrier-Ladd for an additional \$120,000 for FY 23/24 (and an additional \$60,000 for FY 24/25) to close the budget gap during the interim period of searching for a new Senior Minister.
- 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 FY2023, the investment portfolio of the Legacy Investment Fund was up 5.62% (after fees and withdrawals/additions) compared to a benchmark increase of 8.93.%. The underperformance **versus the benchmark** was primarily due to our equity holdings of 56.8% at the time versus a 70 equity/30 fixed and cash benchmark. The value of the Property Assets increased by just over

20% for the year. The ending Legacy Investment Fund Value was up 4.41% year over year.

- Fees: In FY2023, the Trustees paid Astoria \$3,241 in investment management and administrative fees.
- 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.

- Financial Assets:

Legacy Investment Fund Value 6/30/22	\$3,237,912
Legacy Investment Fund Value 6/30/23	\$3,304,796

- Property Assets (10-6 Concord Greene):

Legacy Investment Property Value 6/30/22	\$479,500
Legacy Investment Property Value 6/30/23	\$576,500

Total Legacy Investment Fund Value 6/30/22	\$3,717,412
Total Legacy Investment Fund Value 6/30/23	\$3,881,296

Net Rental Income	\$(36,843)
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Support for First Parish	\$144,341
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- Property Management

- Wright Tavern (in concert with the Wright Tavern Legacy Trust - WTLT)
 - All tenants moved out of the Tavern by end of September 2022 in preparation for structural and engineering repair work.
 - The Wright Tavern Legacy Trust Board assumed a lease for the full building as of January 1st.
 - The engineering and architectural teams developed design documents and blueprints for the repairs, and a contractor was selected for the work.
- All Properties
 - Over the past 5 years, the Trustees have overseen completion of many deferred maintenance items and planned repairs to the Properties (which include the three Cottage buildings and the Wright Tavern, but not the Meeting House). Now that nearly all major deferred maintenance issues have been attended to, properties needs are met as they occur, including:
 - Investigating restoration or replacement options for all windows and window framing in #1 Coan House, #7 White Cottage, and #23 Thayer
 - Rebuilding the walkways from the paths to the doors of #7 White Cottage and #23 Thayer
 - Installing new pollinator gardens at #7 White Cottage and #25 Ball House

- Completing insulation at #23 Thayer over the summer
 - Updating light fixtures, faucets, and shower heads with energy- and water-efficient models where needed
 - Repairing or replacing doors and storm doors
- 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
 - First Parish received a generous gift of \$50,000 from the Estate of Terry Rothermel. In addition, we have been informed that the Estate of Peg Gallo has left a significant bequest to First Parish. Peg's gift, received in FY2024, will be described in greater detail in the FY2024 Annual Report.
- 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.
- Trustee Retirements and Confirmation of New Trustees
 - The Trustees recognized two of our fellow Trustees who were retiring at the end of their terms: Laura Bernstein, who served two five-year terms and generously extended her term for an extra year due to interruptions of Covid, and John Boynton, who served two five-year terms.
 - Roselyn Romberg has agreed to serve a second five-year term beginning in fiscal 2024. The Trustees also welcomed two new Trustees, Jim Sherblom and Mark Haddad; their terms also begin in fiscal 2024.

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

Respectfully submitted,

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

Trustees of Parish Donations -- For FY 2023 -- the Year from July 1, 2022 to June 30, 2023

Schedule 1 The Investments in the First Parish Legacy Investment Fund as of 6/30/2023¹

<u>Par Value / Shares</u>	<u>Description</u>	<u>Market Value</u>	<u>of Portfoli o</u>
<u>CASH AND EQUIVALENTS</u>			
	Cash	69,103	2.1%
	<i>Total Cash and Cash Equivalents</i>	69,103	2.1%
<u>FIXED INCOME FUNDS/ETFs</u>			
6,567	BONDBLOXX Bloomberg 2 YR TREAS ETF	322,556	9.8%
29,419	Northern Lights Fund Inspire Corp Bond ETF	679,285	20.6%
11,955	SPDR Series Trust Portfolio LT Treas ETF	357,455	10.8%
	<i>Total Fixed Income</i>	1,359,295	41.1%
<u>EQUITIES FUNDS/ETFs</u>			
12,891	SPDR Index MSCI EAFE FS ETF	485,346	14.7%
4,200	SPDR Index MSCI Emerging Market ETF	127,260	3.9%
23,115	ALPS Oshares US Quality Div ETF	1,016,829	30.8%
	<i>Total Equities</i>	1,629,435	49.3%
<u>ALTERNATIVES FUNDS/ETFs</u>			
1,049	Aberdeen Precious Metals Basket ETF	91,011	2.8%
8,313	AGFiQ US Market Neutral Anti-Beta Fund ETF	155,952	4.7%
	<i>Total Fixed Income</i>	246,963	7.5%
	First Parish Pooled Investment at Astoria Advisors	3,304,796	100%
	<i>Total Income & Dividends FY 2022/23</i>	76,392	
	<i>Total Administrative Fees & Commissions paid to Astoria FY 2022/23</i>	3,241	
	<i>Fees as percent of assets</i>	0.098%	
<u>INVESTMENT PROPERTY</u>			
	Estimated Fair Market Value 7/1/22	479,500	
	Estimated Fair Market Value 6/30/23	576,500	
	<i>Total Annual Fees and Maintenance Expenses</i>	16,621	
	<i>Expenses as percent of property value</i>	3.5%	
	Total Legacy Investment Fund	3,881,296	
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.			

Trustees of Parish Donations -- For FY 2023 -- the Year from July 1, 2022 to June 30, 2023

Schedule 2 Income and Expenses From Rental Properties

	Coan House (a)	White Cottage (b)	Thayer & Ball (c)	Wright Tavern (d)	Shared Rev./Exp.	Total
Receipts						
Rental Income	-	19,900	49,325	7,350		76,575
Interest					6	7
Total income	-	19,900	49,325	7,350	6	76,582
Payments						
Repairs & Maintenance	41,260	2,295	21,704	3,490		68,749
Electricity	-		1,298	1,963		3,261
Fuel Oil	-	2,049	5,207	5,905		13,161
Water and Sewer	-	499	824	308		1,631
Rehab & Renovation	-	-	1,225	-		1,225
Real Estate Taxes					19,081	19,081
Insurance					5,007	5,007
Bookkeeping					1,200	1,200
Miscellaneous						-
Other					110	110
Total Payments	41,260	4,843	30,258	11,666	25,398	113,425
Additional expenses						-
Capital Improvements						-
Total Costs	41,260	4,843	30,258	11,666	25,398	113,425
Net Rental Income	(41,260)	15,057	19,067	(4,316)	(25,392)	(36,843)

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.

Trustees of Parish Donations -- For FY 2023 -- the Year from July 1, 2022 to June 30, 2023

Schedule 3 Detailed Explanation of the Determination of the Annual Contribution to First Parish Operations

	6/30/2020	6/30/2021	6/30/2022	6/30/2023	
Assets:					
Cash, Checking	47,763	40,683	68,181	29,905	
Legacy Investment Fund at market	2,913,957	3,255,310	3,237,912	3,304,796	
Legacy Investment Property at market	380,000	479,167	479,500	576,500	
FP Campus Real Estate at historic cost	6,100	6,100	6,100	6,100	
Total Assets	3,347,821	3,781,260	3,791,693	3,917,301	
Computation of contribution:					
1 Three year trailing average of investment fund/property	3,333,884	3,477,193	3,596,948	3,777,728	
Net rental income	(9,314)	(14,075)	1,129	(36,843)	
2 Three year trailing average of net rental income	10,093	5,254	(7,420)	(16,597)	
	Fiscal 2020	Fiscal	Fiscal 2022	Fiscal 2023	Fiscal 2024
3 Trustees' judgment of prudent withdrawal rate	4.00%	3.75%	4.00%	4.00%	4.00%
Contribution from Investment Fund	125,697	122,851	133,355	139,088	143,878
Contribution from Net Rental Income	12,331	25,976	10,093	5,254	(7,420)
Approved Request for Additional Support for 2024					120,000
Contribution to First Parish Operations	138,028	148,827	143,448	144,341	256,458
NOTES:					
In the first quarter of each calendar year, the Trustees determine the contribution to be made to First Parish operations for the 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 investment fund 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 investment fund/property 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 3). This is then multiplied by a three-year trailing average of the investment fund/property (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 when the contribution is determined, typically in February or March.)					
The Trustees maintain and rent out several buildings (see Schedule 2). The intention is that 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 considerably from year to year. To smooth out this fluctuation, a three-year trailing average (see the boxed number in the row labeled 2) is used to determine the contribution to FP.					
In most years, 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.)					
In February 2023 the Trustees unanimously approved Rev. Seth Carrier-Ladd's request to temporarily increase the contribution to the Church for two years: by \$10,000 per month for FY2024, and by \$5,000 per month for FY2025.					
Lastly, you will note that the Net Rental Income for FY2023 was (\$36,843). 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 \$40,000 as a partial payment to replace the windows in Coan. In addition, the Wright Tavern Legacy Trust was permitted to defer payment of rent until 12/31/24, with the result that the rental income from the Wright Tavern decreased by almost \$72,000. This deferral significantly reduced net rental income. Moving forward, the Trustees anticipate positive cash flow from all rental properties.					