



# The Annual Report for the 166<sup>th</sup> Annual Meeting: Sunday, June 12, 2022

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## **A CALL TO THE ANNUAL MEETING OF THE FIRST CHURCH IN BELMONT, UNITARIAN UNIVERSALIST**

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Sunday | June 12, 2022 | 11:15 – 12:45, at The First Church in Belmont

Pursuant to a call by Samuel James, President of the Parish Board, you are hereby notified that the Annual Meeting of The First Church in Belmont, Unitarian Universalist will be held on Sunday, June 12, 2022 at 11:15am for the election of officers, status of next year’s budget, and the transaction of such other businesses as may lawfully come before the meeting.

Hereof, fail not, and make due attendance at said meeting and time.

James Hencke

Parish Board Clerk

Only active members and active youth members, who have had standing as such for not less than seven days prior to the meeting, may vote.

### **About The Annual Report**

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We have asked contributors to consider and answer the two questions:

- What do you appreciate, or are most proud of, when you think about your program, group, committee, or staff position over the past year?
- What do you hope for in the next year for your program, group, committee, or staff position?

Where and when needed and appropriate, contributors have included financial reports, metrics, and images.

### **Slate of Candidates To Be Voted Upon At The Annual Meeting Of The First Church in Belmont For 2022 – 2023**

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#### **Parish Board Officers to be elected:**

President: Laurie Graham (2022-2024)

Vice President: David Deese (2022-2024)

#### **Continuing Officers to be elected:**

Treasurer: Martha Read (2020-TBD)

Parish Board Clerk: James Hencke (2021-2024)

**New At-Large Trustees to be elected:**

Martha Courant (2022-2025)

Ariane Frank (2022-2025)

**Continuing At-Large Trustees to be elected:**

Priscilla Cobb (2021-2024)

Roger Gallagher (2021-2024)

Pam Eggert (2020-2023)

Anjali Kumar (2020-2023)

Doug Massidda (2020-2023)

**Past President:**

Samuel James (2022-2024)

**New Finance Committee Members to be elected:**

Jon Bridges (2022-2025)

Catherine Claypoole (2022-2025)

Lauren Corning (2022-2025)

**Continuing Finance Committee members, all returning, to be elected:**

Stefan Frank (2019-2022) (Chair 2020-2023)

Mike Widmer (2019-2023)

Brian Caputo (2020-2023)

**Ex-officio members:**

Laurie Graham, Parish Board President

Martha Read, Parish Board Treasurer

**Nominations for the Committee on Ministry:**

Jackie James (2022-2025)

Leslie Kolterman (2022-2025)

June Lattimore (2022-2025)

**Continuing Committee on Ministry members to be elected:**

Margaret Dunn (2021-2023)

Mary Harrison (2021-2023)

David Lind (2021-2023)

Laura Wooster (2021-2024)

Nick Hausmann (2021-2024)

Kathy Crawley (2021-2024)

Chris Jablonski, ex officio

**Nominations for the Nominating and Recruitment Committee:**

Martha Gallagher (2022-2025)

Marion Westgate (2022-2025)

**Continuing members to be elected:**

Nicole Griffin (2020-2023)

Karsten Kueppenbender (2020-2023)

Catherine Stalberg (2021-2024)

Jonathan Wolf (2021-2024)

*Respectfully submitted by the Nominating Committee Co-Chairs: Richard Waring and Nicole Griffin; Karsten Kueppenbender, Jeanne Widmer, Catherine Stalberg, and Jonathan Wolf*

## **Parish Board Annual Report**

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### **Introduction**

We are back together after a two-year hiatus and what a two-years it has been!

The leadership of the church—staff and lay—have worked closely throughout this year with our robust congregation to reach this moment. We have a ways to go because Covid has left its mark. Even so, our foundation of who we are, what we believe, and what we do is intact as much today as it was pre-Covid. This year has been a case study in how a congregation can manage a crisis and thrive. We have not missed a beat. In fact, we have gained a couple of beats along the way. It is impressive to be part of a community where members consistently do what needs to be done, not because they must but because they may. It is gratifying to assume a leadership positions in First Church because dedicated people complete remarkable tasks to ensure the church’s wellbeing.

Collaborating closely with our staff is an inspiring experience because of their professional skills and commitment to the church. I hope in return they feel well cared for. I believe they do. Our committee leaders have kept their committees going as best they can, which is a challenge in these times. The Finance Committee has focused on securing the financial health of the church. The Board has been willing to address any topic that needed attention as well as continue to plan for the future. The commitments, creativity, and goodwill, during an unprecedented time, is inspiring!

Given that we have just begun being back together in person, this is a detailed report so that you understand the Board's responsibilities for the past year.

## **Covid Task Force**

The TF for a second year has been at the center of the church's activities and has worked closely with the Board. While we had better data to guide us this year than last, we still had to adapt to Covid's variants. The members are Eleanor Hobbs, Eva Patalas, June Lattimore, Laurie Graham, Chris Jablonski, Abby Donner, Marion Westgate, and me. Eleanor and I are rotating off the committee. Eleanor's guidance and depth of knowledge will be missed. Thank you, Eleanor. David Deese will replace me. The group helped translate an unknown virus into language that the Board could work with. The TF met monthly and was continually assessing when it might be safe to open the church, starting with Sandy Island last fall. Opening has not been a straight line, e.g., cancelled Christmas Eve services followed by small steps to open for Vespers services and limited seats in the worship services. We are now fully open, and the TF's guidance has not only been invaluable but will continue to meet to help us manage these uncertain times.

## **Board's Strategy**

The task of the board is to manage the day-to-day affairs of the church as well as plan for the future. Pam Eggert is our strategic plan coordinator, and we are gaining ground on being able to map our needs and address each one. The strategic plan is a living document and this year it has been more operational and less aspirational because of the pandemic. We continue to focus on the following three areas:

- Strengthen Our Foundation, e.g., learn from the past; update our by-laws; and clarify roles and responsibilities between the Board, staff, and committees.
- Learn from the Crisis, e.g., manage Covid's impact; assist the staff in creating a digital presence; address feelings of isolation and disruption in the lives of so many in our community; and manage our finances.
- Plan for the Future, e.g., continue to align the Board, staff, and committees; involve staff in Board activities; create a safer congregation; develop a digital presence; and be more involved in Belmont.

The Board has stayed true to our plan and completed most objectives and referred a few to the next church year.

## **Finance**

The Board is guided by the steady hand of our Treasurer, Martha Read to manage our finances. If you are not fulfilling your pledge online, please make plans to do so. ([click here to pledge online](#)) We have the technology in place to make your giving an effortless process for you and the staff. Stefan Frank and the Finance Committee have been a force in their support of Martha and the Board with their continued oversight of the fiscal needs of FCB. Consequently, the board was enabled to focus on the pandemic and the operational needs of the church.

Last year we were able to raise all staff salaries to the midpoint of the UUA guidelines. It is our commitment to take care of our staff by providing an equitable compensation package. Martha, Laurie Graham, Pam Eggert, Chris Jablonski, and Ian Garvey are mapping a way forward for both the Finance Committee and the Board.

Embracing Our Moment is the campaign theme of our Pledge Drive, led by Susan Galli and Bruce Logan. Thank you, Susan and Bruce. The theme captures what our community has been able to achieve over the past two years as we have indeed embraced the moment! They have been tireless partners to help us secure pledges so that we can plan for FY 2023. As of this writing (6/10) we have raised over \$646,000 from 230 pledge units. The church's community is an exceptionally generous group of people for whom we have the pleasure of working. Think about it, we have been away from each other as a church-as-a-whole for two-years and our members continue to support First Church and our wonderful activities. Our future is bright!

## **By-Laws**

The board asked Roger Read (Chair), Martha Courant, and Anne Stewart to conduct a complete rewriting of our by-laws. We have amended our by-laws over the years to the point that we are amending amendments. Roger, Martha, and Anne are reviewing all elements, updating them, adding new items to the text, and changing the wording from legalese to everyday language. John Howe, the church's historian, is reviewing the Ames Covenant— "In the love of truth and in the spirit of Jesus we unite for the worship of God and the service of man."—and will make recommendations to the congregation in the future to keep or replace the covenant in the by-laws. The By-Laws Task Force will present their recommendations in the fall during a special meeting to approve this important document.

## **Safer Congregation**

During the Annual Meeting, Bayard Klimasmith will present ways we are going to continue to make all activities with our children and youth a safer experience. Thankfully, a Safer Congregation is not the byproduct of an incident that has occurred. Rather, it more explicitly states how lay and staff members will collaborate with them. This will help parents better understand the care that has gone into the programs in which they entrust their children. Thank you, Bayard! This has been a three-year task and you have helped us all be better caregivers.

## **In Addition . . .**

We have also been engaged in smaller tasks that are important to the life of the church. They are as follows:

- The Board has reviewed and adjusted the roles and responsibilities of the officers as well as trustees. This will help church members better understand how the Board accomplishes its work and who is responsible for each part.
- Priscilla Cobb and the Social Action Committee are leading 11th Hour Calling. It is an interfaith effort on the 11th day of the month at the 11th hour to ring the church bell for 11 minutes to remind us of the importance of dealing with climate change.
- Mike Flamang continues his heroic efforts to have our tower clock repaired. Hopefully, we may soon hear the peel of the bells every 15 minutes. First Church has partnered with the Belmont Citizens Forum to request Community Preservation funds to repair the clock. The clock belongs to all citizens of Belmont in that initially we provided the tower, and the town provided the clock.
- Monte Allen and FCB Green has worked with the Board to move the church toward carbon neutrality by 2035. FCB Green will lead the way by working with the Board and the congregation to gather the needed information and prioritize a list of green initiatives. We recognize that climate change is a growing global threat, often imposing the greatest cost on those who have the least. You will hear more about this next year
- In January, the Belmont Police chief conducted a safety assessment of FCB and provided suggestions on ways to address both our building and staff security. Laurie Graham has been leading an Active Shooter effort to train all staff, lay leaders, and teachers in what to do if confronted with an active shooter. I am stunned, stunned that this is a topic that we need to take seriously but we do. Training has been extremely helpful for those congregations that have faced such a crisis. You will hear more about this in the future.



## **Yes, our community is open!**

I am deeply honored to have been President of the Parish Board and had the opportunity to work closely with Rev. Jablonski (partner extraordinaire), the Board, the staff, and the lay leaders of the church. It is both humbling and inspiring to be part of an exceptional group of people producing remarkable results! We all have reasons to be proud of our church community! Laurie Graham is our new President. We are fortunate to have a woman with so many leadership skills and contacts taking us into the next two years. Thank you, Laurie, you have been a terrific partner and I have thoroughly enjoyed collaborating with you.

Respectfully submitted,

Sam James, President

Officers

Sam James, President

Laurie Graham, Vice President

Martha Read, Treasurer

James Hencke, Clerk

Members-at-Large

Pam Eggert

Doug Massidda

Anjali Kumar

Lynn Peterson Read

Priscilla Cobb

Roger Gallagher

## **Staff Reports**

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### **Senior Minister**

Rev. Christopher Holton Jablonski

While we are still not done with this challenging moment, it is remarkable what we have done in these last many months. Over and over again we have pivoted and then pivoted again to meet the changing circumstances we have encountered and throughout the whole time the church has thrived.

The staff team has remained connected, collaborative, creative and committed. It has been an honor to serve with them. Each of them has brought the church a precious and singular set of gifts and together we have been a solid team. I am, as ever, so grateful for each of them, and so excited for all they will create in the coming years.

But we, of course, do not serve alone. We are incredibly blessed to work alongside dozens and dozens of incredible lay leaders. So many of you pour yourselves into volunteer

positions of all sizes. It is truly remarkable everything we have achieved together, this staff team and these leaders.

I am so grateful.

In the coming year I hope that we build on the momentum which has returned in these last many months. While we return to the core programs and activities which have brought us to this good place, I also hope that we continue to innovate and explore new ways to serve our mission.

It has been a real joy to return to in person Sunday worship. Seeing people enter the sanctuary for the first time in more than two years was one of the most beautiful things I have seen in my ministry. This will continue to be a huge part of what we do.

And we have branched out into digital ministry in fascinating and effective ways. The podcast has harvested some touching and incredible stories and has dug deep into topics of theology, spiritual growth, service, Justice and more. I look forward to deepening and co tinting these new offerings as well as exploring more.

And for me personally I hope to continue to get better as a minister. I hope to do this work for a long time to come and I know I can do better and I will. This summer I will explore how I want to deepen and grow in particular and I will share my goals for the coming year in the staff board report in August.

We are so blessed to be sharing this moment together. While so many churches are floundering, we are strong. While so many staff teams are experiencing massive turnover, we have an experienced team, all very good at what they do, returning to serve again as a team. And we have a great Board and wonderful committees, all pointed in the same direction, all rowing together in time.

And for you all I hope for a year of more connection, more joy and more peace. This has been a tough chapter for so many of us, and I am so aware, especially in these kinds of times, of the precious gift of community. I am so aware that these hard times are easier when we face them together.

So much love to you all,

Chris

## **Adult Programs Director**

The goal of First Church adult programs is to support our community by providing opportunities for spiritual growth and connection. We offer programs that reflect our UU values and challenge us to think deeply and creatively. During this complex year we have sustained and expanded our ongoing programs and support groups. I feel encouraged that members of the congregation continue to find new ways to want to be together.

The number of programs that are ongoing continue to expand and now include First Church (FC) Cooks, the Alliance, FC Book Group, Science and Spirituality, FCB History Group, Gather Round, Informal Poetry Sharing, Meditation, FC Garden Group, our two film discussion groups, Women's and Men's groups. All have dedicated followers. In October, the Parish Board designated John Howe as lead church historian and he has ably chaired the FCB History Group (see separate report).

The challenge this year has been to assess the safety of offering in person programming. We have had to postpone several programs and/or to pivot and offer programs via Zoom. The Adult Programs Committee, ably co-chaired by Debbie Dobbins and Nicole Griffin, has been actively engaged in making those decisions. Fortunately, thanks to Ed Siegfried, most of our educational programs were recorded and are available on our FC YouTube channel ([https://www.youtube.com/channel/UChWU9XppvP3\\_AbUXc4ooWMA](https://www.youtube.com/channel/UChWU9XppvP3_AbUXc4ooWMA)).

I am so proud that our Small Group Ministry (SGM) groups are flourishing. This year we trained two new facilitators and we now have nine groups that will be continuing next fall. I am grateful to our dedicated team of facilitators (Lynn Anderson, Devon Beckett, Margaret Eagle, Rick Hawkins, Susan Kobayashi, Jean O'Farrell, Paul Santos, Catherine Stalberg, and Eleanor Sugarman) who have been tending their groups as well as trading topics and supporting each other. We anticipate creating additional groups this fall.

Respectfully submitted, Lillian Anderson

## **Children's Religious Education**

Director, Nathan B. Sellers

Program Assistant, Wendy Conroy

As speculated in last year's report, our CRE website became a large part of our expanding program as we worked through the pandemic. Our central system of content was available to both CRE families and online visitors, with additional online content/resources for parents during the long winter months. I'm pleased that we kept in touch with families during a time of uncertainty via the website, CRE outside gatherings, specific in-person

classes (8th grade OWL), and our monthly email updates – which ultimately allowed the children to ease back to in-person classes this spring.

Although not all CRE families have returned to in-person classes, we’ve welcomed five new active families to the program this year and are currently averaging 37 children on a Sunday morning (March 27th to May 7th). The website has seen over 400 visits since October 2021, and over 70 lessons have been downloaded from our resource pages.

Next year, I’m most looking forward to launching the new CRE multi-age workshops, which include an eight-part series on children finding creative solutions to global issues (“Imagination Station”) and a six-part series on racial injustice (“Breaking Chains”). I feel these workshops will shape how we structure Sunday mornings in the future, and will give us a platform to dive into relevant UU topics.

## **Congregational Administrator**

This was another year of innovating and updating (i.e. modernizing) church administrative and operational systems to gain efficiencies as we continue to work in a new way. Rental contracts and HR paperwork are now done securely 100% online, for example.

It’s been great to see the building in use again in the spring, with some Scouting troops, rehearsing musical groups, and a school party rental in the Parish Hall.

It’s also been an ongoing professional pleasure to work with the board and my amazing colleagues, under the leadership of Rev. Chris, as I support the work of the congregation in the church and in the world.

Our sexton, Luis Carrion, has continued his superb job of keeping the building operating safely and smoothly while it was closed and of course has been back on Sundays to help with setting up for services, both inside and outside.

It’s been a joy to have the Friday Folders back in the building and they are the ones you can thank for folding your Sunday orders of service:

Deborah Blumberg

Eleanor Sugarman

Eloise McGaw

Heli Tomford

Ilse Kaprelian

Lanier Smythe

Louise Bray

Martha Read

ML Landfried

Pat Hawkins

Pat Paul

I look forward to serving the congregation in the year to come from my Vermont home after my husband and I move in July. I deeply appreciate and thank the church leadership for their trust in me and their willingness to try this new work arrangement.

Respectfully submitted, Janice Zazinski

## **Director of Music**

I am thrilled and humbled by the continued commitment to music that the FCB community shows. Each time we were able to perform in person, for a few Second Friday Concerts in the fall, and a Piano Benefit concert in April, we had an enthusiastic and supportive audience. All of our choirs resumed in the fall, and while we are still singing masked, we have some new choir members and lots of enthusiasm for singing together. The return of the musical has also been a wonderful thing for the program. The cast is small, but it's an incredibly talented group of young people.

This year I've been especially impressed by the flexibility and creativity of the music staff I work with. The Vespers services were a new addition to the calendar, but they provided an opportunity to hear some beautiful music from all of our soloists and Simon, that helped create deep and meaningful worship services. While we are not sure at this point if the Vespers services will continue into the future, they were often the highlight of my week.

Next year, we will be kicking off the season with another children's musical, returning to our usual fall schedule. The benefit of the spring musical this year has been the nice weather, the downside has been almost everything else. Scheduling is much harder in the spring, with sports, end of year concerts, graduations, and vacations all conflicting. I'm looking forward to returning to the November show! We have also been working to expand our Second Friday Concert series, and I'm excited for the new performers on the calendar. We have started to introduce more variety into the concert series, moving away from the traditional "coffeehouse" folk sound. While there will still be some excellent and talented folk artists on the series, over the next few years there will also be jazz, Celtic bands, classical vocal music, and more. The long-term goal is to firmly establish the First Church Parish Hall as a concert venue in the northwestern Boston area, where people can regularly go to hear high quality performances of many styles of music.

I'm so grateful to all the people I work with – to the music staff, music committee, choirs, parents, and volunteers for everything they do to help keep the music program vibrant. It's a privilege to work in such a supportive community.

With deep gratitude, Ian Garvie

## **Membership and Outreach Manager**

The membership committee is proud to have welcomed a large number of newcomers to First Church this year.

In the fall we organized “Journey to Membership,” our three-part series of workshops, which was held in person. Six newcomers to the church attended the workshops, all of them stepping inside the building for the first time. With the church reopening in the spring, bringing a wave of new folks to our community, we decided to defer the next round of workshops to next fall.

With the reopening of the church in early spring, the committee joined forces with the Outreach Committee and the Fellowship Committee to plan events together. The new “superteam” of three committees will be collaborating on social events and welcoming newcomers to the church.

In May the superteam organized an event for newcomers: a backyard dinner party hosted by Fatima Serra and Doug Massidda. It was attended by eighteen newcomers, including some of our new members who had joined during the pandemic, and a flock of eight children. It was delightful to see so many young families who have discovered First Church in the past year. Two of the new folks signed the membership book on the spot, and I anticipate several more will become members in time for the New Member Welcome on June 12.

At the time of writing, we have welcomed six new members to the congregation since the last Annual Report. They are Jeannette Gerzon, Alexandra Goho, Justin Hardy, Norah Piehl, Emily Wilson, and Nathan Wilson. We are very proud of the church’s new members, and we hope to welcome more before the end of the church year.

The Membership Committee is made up of Samuel Foster (staff liaison), Sara Oaklander, and Fatima Serra (chair). We want to thank Yasmin Azad, Ranganath Nayak, and Jennifer Roderick for their service on the committee during part of the church year. We also want to thank Jess Hausman, Martin Plass, and Donna Ruvolo for collaborating with the committee, and for helping to make the newcomer event such a success.

Respectfully submitted, Samuel Foster

## **Youth Director**

This year, we didn’t just survive, we thrived. Our numbers remained strong over the course of the year, and we are ending with a very tight knit group despite COVID-19 preventing us

from engaging in those core bonding activities like overnights, serving learning trips and retreats. The group was dedicated to being a safe space for exploration and growth and it's because of them the program went so smoothly. I'm incredibly grateful for the fact this group was my first with FCB. Some FCB youth highlights:

1. We are an LGBTQ+-safe environment committed to self betterment and identity exploration.
2. Our website is up and running and has gained traction over the year, we are looking forward to seeing it grow—[www.fcbyouth.org](http://www.fcbyouth.org)
3. We were able to grow our relationship with Sustainable Harvest Int'l despite not being able to go on a service learn trip with them this year.
4. Our youth are deeply committed to taking action against climate change and we hope next year brings continued leadership and a FCB youth Climate Action Committee.
5. We were able to connect with UU Mass Action to double down our social action efforts and we are looking forward to seeing that grow as well.
6. Our youth like to have fun! Sometimes the biggest things we all need it to be reminded that an important part of life is to enjoy it.

Next year we hope: To grow! I hope we can host at least one retreat as well as a service learning trip with Sustainable Harvest Int'l. It's important for me as a director to ensure our group is not only growing in size and bond, but also in diversity. I am looking forward to deepening relationship and branching out to invest in new ones in the coming year.

Respectfully submitted, Raeann Mason

## **CommUUnity Collaborative (CC) Report**

The Community Collaborative was a new project that provided an opportunity for Unitarian Universalist ministers and staff teams of smaller congregations to create programs that could be shared with their congregations. First Church in Belmont received a grant from the UUA to create the Collaborative and mentor the process. We invited six congregations - First Church in Jamaica Plain, First Parish in Medfield, UU Congregational Society of Westborough, First Church in Salem, First Parish of Northborough and First Church in Dedham to be actively involved.

Our course catalogue included varied and stimulating programs and workshops to help adults deepen their faith, wrestle with big questions and nurture their souls.

We offered the following courses this winter:

- Justice Documentary Film Series discussion (4 sessions)
- Coming of Age for Adults (3 sessions)
- Parenting Support Group (weekly from February- March)
- From Fear to Eternity: UU Conversations on End of Life Issues (3)
- Topics in Theology with Rev. Lauren Smith (2 sessions)

The attendance for the classes varied but represented a good cross section of the congregations and met the goal of expanding program offerings for each of the congregations.

The CC web-site (<https://www.commuunitycollaborative.com>) developed by Nate Sellers worked well for information and registrations were facilitated by Wendy Conroy.

The ministers felt that our time together was well spent and created a collaborative community that was meaningful to them, especially during the pandemic. In the coming year we will expand the group of ministers and presenters and will broaden the invitation for participants. We will share these classes with everyone at First Church as well as all the congregations in our area.

Respectfully submitted,

Lillian Anderson and Rev. Chris Jablonski

## **Committee Reports**

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### **Ad Hoc Committee on Neighborhood UUnity Groups (NUUGETS)**

Not much to report. All NUUget groups continue to exist and the communications network remains ready to be used. Some NUUget groups are very active, others, not so much. It is hoped that if we feel safe enough from the dangers of COVID, we can encourage each NUUget group this summer to get together in someone's yard and socialize, have a cocktail party, or have a cookout, so that each group can meet and greet the NUUget members in their neighborhood. We still try to assign each new person who participates in First Church, to the NUUget group in their neighborhood.



Submitted by, Robert McGaw, Chair of Ad Hoc NUUGet Web Committee

## **Adult Programs Committee**

The APC Committee has continued to be Co Chaired – Nicole Griffin and Debbie Dobbins; Members: Bill Blumberg, Martha Hicks-Courant, Mark Davis, Pam Eggert, Karl Klasson, Susan Kobayashi, Margaret Marks, and Ed Siegfried. During the second half of the year Margaret Marks decided to step down due to the demands on her time related to supporting the Afghani family. And Martha Hicks-Courant stepped down due to demands on her time on the By-Laws Committee.

The need for connection during the pandemic has continued to be strong and we believe the Adult Program Committee, under the guidance of Lillian Anderson, responded with vigor. The 2021 – 2022 Adult Program Committee has felt called to continue to respond to this need. As in the past, the Committee demonstrated its ability to be a repository for ideas from members of the congregation and to be an incubator for ideas to bring to our fellow Church members. Under Lillian's strong leadership this dynamic has continued and, with the Committee, we have continued to draw on the rich resources found in our congregation and our community.

Now the second year of being in a virtual environment this aspect of our efforts has been stable with the previous year. However, with the efforts of Ed Siegfried we have been able to offer edited recordings of our programs on the Church's YouTube Channel, where they can be viewed by congregants at their leisure. We have always asked presenters if they agree to be recorded. Attendance at the ongoing programs such as the two movie groups, First Church Cooks, the Gardening Group, most of which are on a monthly schedule, has been strong. The one-off programs have also generally had good to strong attendance.

We believe people were drawn to the opportunity for intellectual stimulation and connecting with other FCB members, aided by virtual accessibility. In previous years, when in person, there was always a core group of the same attendees, but the video platform enabled us to expand that group.

For all of these reasons we are proud of the support and rigorous efforts of Lillian Anderson, and the responsive and resourceful Adult Programs Committee members, which all taken together, have been resourceful, and full of energy and focus.

Given the current state of COVID-19 in our community, we are planning to have more in-person programs in the next church year while continuing to utilize Zoom for certain programs. Once we are able to share food in the church, we will bring back the annual Women's and Men's potlucks. We are also in the early planning stages to have an on-site

plant-based cooking program where attendees can help cook or just watch, and all can enjoy the final product together.

Zoom has been a good fit for mid-week evening programs, and has also been beneficial for many people who would not normally be able to attend due to distance, childcare, or mobility issues. We will continue to work with our program presenters to determine whether to hold a program in-person or via Zoom.

Since two of our committee members have stepped down, we will be actively looking for at least one new member to join our group and help us continue to offer a broad array of enriching programs to the First Church community.

Respectively submitted by Debbie Dobbins and Nicole Griffin

### **Adult Programs 2021 - 2022**

- September 26 - May 15 - FC Cooks - average attendance = 17 people; 8 presenters - Fariba Houman, Martha Gallagher, Michael Griffin, Jane Minasian, Richard Curzi, Jackie James, Lauren Crocker, Ariane Frank
- September 29 - December 15 - Environmental Justice with David Deese - 6 sessions - average attendance = 18 people
- October 23 - February 19 - Gather Round with Rachel Greenberger - (4 sessions) Hope, Animals, Attics, Kinning - average attendance = 16 people
- November 7 - Theatre and Democracy panel discussion - 15
- January 9 - Writing Memoir with Martha Spaulding - 10 (4 sessions)
- January 9 - Introduction to Spiritual Practice - 27
- January 11 - Understanding Gender and Sexuality with Ran Courant-Morgan -19
- January 18 - Gender and Sexuality - part 2 - 24
- January 25 - Conflict and Integration (Massachusetts Senate Redistricting) with Will Brownsberger - 23
- February 13 - Genome Editing with Alan Cantor - 27
- March 8 - Journey to a Plant-based Diet with the Griffins - 19
- March 13 - Four Novellas with Peter Guthrie - 10 (4 sessions)
- March 18 - The Oscars with Nate Sellers - 9
- March 29 - Safe Congregations with Bayard Klimasmith - 8
- April 5 - Is the War in Ukraine an Ethnic Conflict with Gerald Easter - 30
- May 7 & 14 - Mount Auburn Cemetery Walks with John Howe - 20
- May 20 - FCB Annual "Moth" Hour with Ian Garvie and Richard Waring

### **UU Belmont Alliance programs**

- Backstage at the Musicals - Sandy Nayak
- Coral Reefs - Mark Rosenstein
- Loire Valley - Nicole Bernstein
- Nativity in Western Art - Nancy Baker
- Indomitable Women - Laurie Noble
- History of FCB - John Howe
- Woodworking Art - Derrick Te Paske
- Traveling to Ghana in 1972 - Jean O'Farrell
- Return to Kansas - Suzi Teegarden and Vickie Choitz (photographers)

### **Ongoing monthly or recurring adult programs**

- Meditation (weekly) James Hencke
- FC Garden Group - Pam Eggert, Jess Hausman
- FC Book Group - Karl Klasson and Christine O'Neill
- Saturday Film Discussion with Nate Sellers (Spirituality themes)
- Saturday Film Discussions (Black focus) - Diana Dill and Eva Patalas
- Science and Spirituality - Kirk Israel and Erika Nesse
- Informal Poetry Sharing - Yasmin Azad

### **Ongoing support groups**

- Wednesday Women's Group - Miriam Baker, Debbie Dobbins
- Monday Men's Group - John Little, Martin Plass, Karsten Kueppenbender
- Wednesday Men's Group - Downing Cless, Mark Davis
- Thursday Men's Group - Paul Santos

### **Small Group Ministry Groups Facilitators**

- Lynn Anderson
- Devon Beckett - started January, 2022
- Margaret Eagle - started January, 2022
- Rick Hawkins
- Susan Kobayashi
- Jean O'Farrell
- Paul Santos
- Catherine Stalberg

- Eleanor Sugarman

## **Committee on Ministry**

This was the third year of this Committee, but this year marked the first year where our membership was selected through the Nominating Committee and voted on by Annual Meeting. The dedication of the members of this Committee has been so constructive to our work. This year, despite COVID and all its ups and downs, we were able to have our Listening Circles and able to produce a concise and thorough report for the staff and community of First Church. Despite not having in-person worship and opportunities for in-person conversations, Committee members made efforts to reach out to individuals and bring feedback to the Committee and senior minister.

As I end my three -year term on the Committee, I continue to hope for increased visibility and understanding of the Committee on Ministry's role as a trusted resource on community concerns. The Committee also hopes to create a stronger relationship with the Board to understand areas of the church ministries they wish us to focus on. The Committee plans to develop alternative types of "listening circles" in the year ahead in order to expand our outreach to a variety of demographics, including youth and children.

It has been an honor to serve on this amazing Committee and be given the opportunity to learn about the commitment and love we all have for First Church .

Submitted by Eloise McGaw

## **FCB Forward Campaign**

The FCB Forward Campaign is rapidly approaching a successful conclusion. First conceived five years ago following our 2017 annual meeting, the Campaign set an original goal of raising \$1.25 million to fully eliminate our indebtedness, support a range of improvements to our building and property, and establish a reserve for the expected refurbishment of our organ. During the Campaign's fall 2018 solicitation phase the congregation very generously provided pledges of \$1.291 million, exceeding this goal. However, as we all know, the COVID-19 pandemic necessitated a shift in our community's priorities. To support the physical reopening of our church building and enhance the safety of large indoor gatherings, nearly \$300,000 of Campaign funds were used to support the timely installation of a new indoor ventilation system in our historic 1890 sanctuary. Consequently, while the Campaign's primary objective – the elimination of our mortgage indebtedness – was achieved, all other Campaign priorities were proportionately pared back. The endowment

loan taken in 2004 to support our parish hall building project was restructured, and funding for other important projects reduced.

Because the Campaign's other unmet needs remain urgent, the Campaign team is making a final push to achieve fulfillment of all outstanding pledges. We are gratified that, in response to the Board's appeal to accelerate gifts a year ago to enable timely completion of the ventilation project, several parishioners made additional Campaign gifts totaling more than \$23,000, resulting in a theoretical Campaign total result of \$1.314 million. Over the past year, in response to our year-end 2021 reminder, more than fifty out of eighty households completed their outstanding Campaign pledges. As of mid-May 2022, approximately \$38,000 in original Campaign pledges remain outstanding. This result to date translates into a fulfillment rate, to date, of over 97%. We are working to gain greater clarity on all remaining pledges by the time of Annual Meeting.

In closing, we want to express our renewed appreciation to the many volunteers who have worked on all phases of FCB Forward and, on behalf of the entire Campaign team, our deep gratitude to all members of the First Church community who have so generously supported this important effort.

Committee:

John Howe, Co-chair; Heather Quay, Co-chair; Leslie Kolterman, Campaign Manager

Submitted by John B. Howe and Heather Quay, FCB Forward Co-Chairs and Leslie Kolterman, Campaign Manager

## **Fellowship Committee**

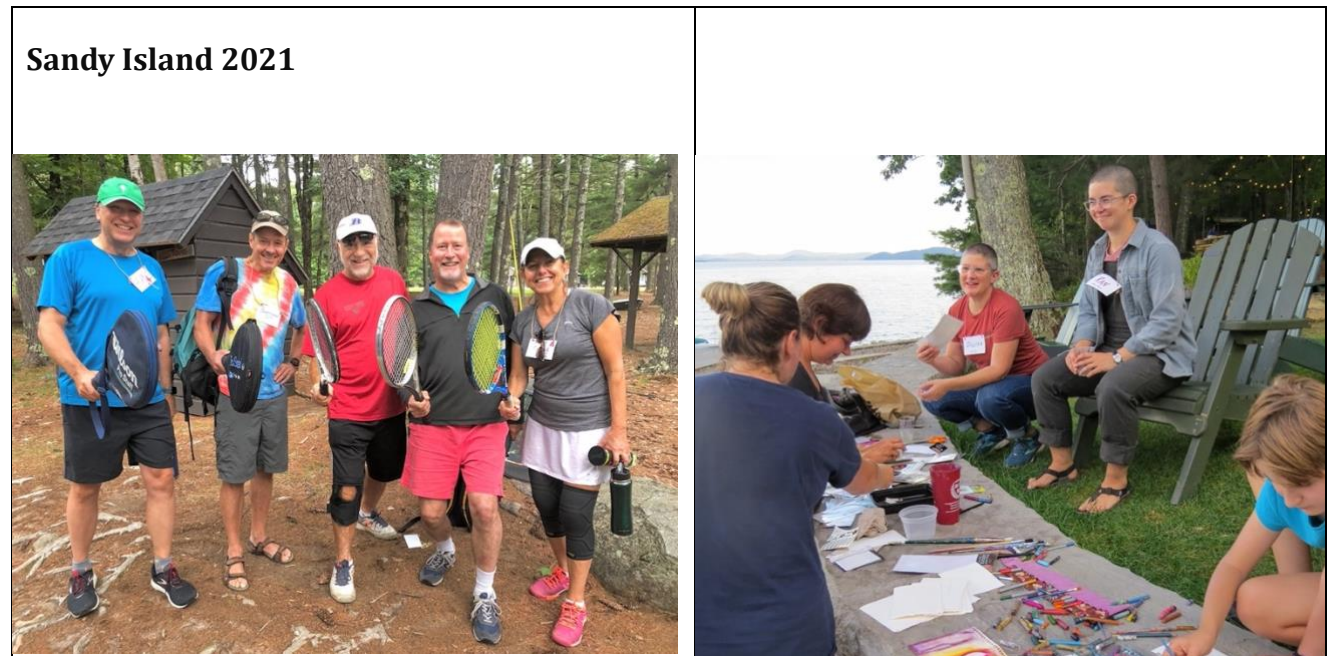
The Fellowship Committee had adopted and readopted to the changes during the year in many ways and as Covid cycles wore on our sights were set for the annual crown jewel, the actual live and in-person weekend retreat at Sandy Island. Although it was a smashing success with many participants, the marathon of oscillating tasks required in battling through the constant curve-ball rules that Covid safety demanded became increasingly more arden and urgent, right up until some rapid antigen tests were performed there at the dock where our passengers boarded the island ferry! Both our minister Chris and our PB President Sam had to cancel their plans to attend at the last minute due to the menace related to Covid.

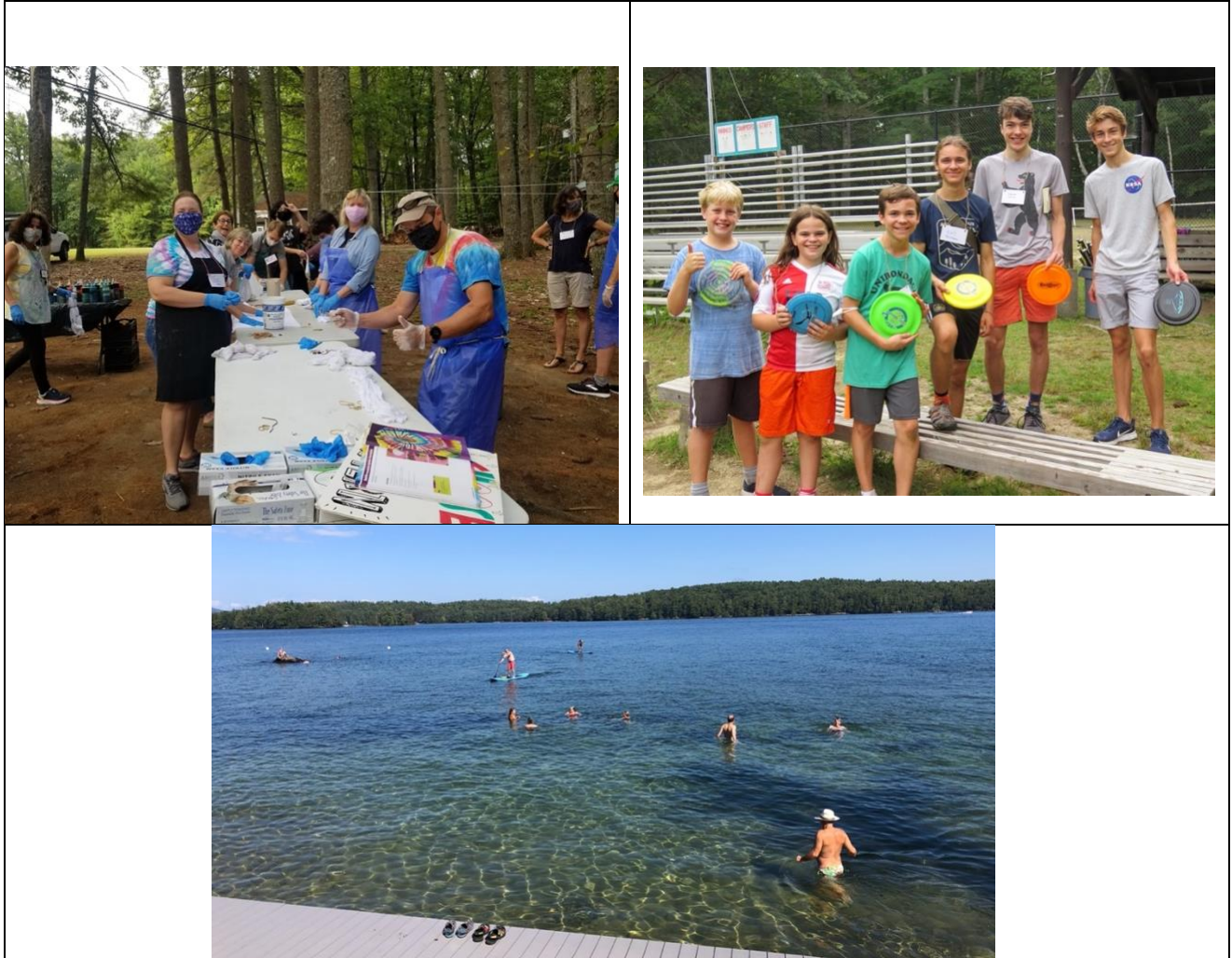
In the end the grand final success story weekend was also costly as our two fabulous co-chairs as well as other members of the committee succumbed to their effort much like

Pheidippides. Perhaps a statue can be built on Sandy Island commemorating them and the heart they put into this event.

There were no other Fellowship committee events following the September Sandy Island outing as our committee was reduced to 2 survivors and was later merged with 2 other committees that suffered similar challenges, into one super committee. The super committee, made up of members of the Membership Committee, the Outreach Committee, and Fellowship did hold an event in May 2022, an outdoor gathering of new and aspiring UU's and pride can be attributed to our minister as this committee was his brainchild, a testimony of a never-quit attitude.

Submitted by Douglas Massidda





## **Finance Committee**

### **The Committee**

The members of the Finance Committee this year are:

Stefan Frank, Chair

John Howe

Jeanne Mooney

Mark Thurber

Mike Widmer

Brian Caputo

Sam James, Parish Board President (ex officio member)

Martha Read, Treasurer (ex officio member)

### **The Investment Committee this year consisted of:**

Mark Thurber, Chair

Jonathan Wolf

Scott Johnson

The Investment Committee is appointed by the finance committee.

### **Goals, Objectives, Responsibilities**

The Finance Committee, elected at the Annual Meeting, serves in an advisory capacity to the Parish Board in financial matters affecting the church and the well-being of its operations. It also is generally responsible for the finances of the church, encompassing tasks such as:

- Working with the leaders of the Stewardship Drive to advise and assist in setting pledge goals.
- Reviewing the performance of the church's endowment, discussing related issues with the Investment Committee, and formally appointing the members of the Investment Committee.
- Tracking the cash flows of the church for early identification of variances from budget.
- Reviewing financial matters throughout the year, as well as assisting with the formation of the annual church budget and advising the Treasurer and Parish Board President.
- Resolving matters of accounting treatment of unusual financial items with the Treasurer.
- Assisting with communication of financial information to the congregation.

### **Committee work**

- Even though the pandemic did affect us for the whole of this church year (FY22), we managed to find time to discuss topics beyond the ongoing tactical financial needs of the congregation.
- Early in the church year we discussed and decided on an [operational reserve policy](#) that we use as a guideline for right sizing our stabilization fund and guide any actions on the endowment. We also published a detailed [Final FY21 report](#) in early November.
- Mark Thurber led a detailed investigation into the discrepancies between **budget** numbers and **actuals** over the last 10+ years with the goal to find out whether we have an overall tendency towards conservative budgeting. The result showed that there is no systemic long term tendency in our budgeting confirming our approach as overall realistic.



- Together with Martha Read, Mark used this long term data to **better forecast** the timing of the pledge income over the church year leading not only to more accurate late payments predictions but also allowing us to see potential deviations much earlier.
- One focus this year was working with the teams and individuals handling our **rental** income as there is a major change coming for the Johnson House usage profile. Brian Caputo is our Finance Committee representative on this task force.
- Another close collaboration was with the **compensation task force** investigating next steps for our continued journey to pay our staff fairly. While we are proud to have reached a fair salary for everyone, the inflation induced cost of living adjustments and the non-competitive benefit plans are still putting significant expenses ahead of us.
- Of course we also connected with the **stewardship committee** as they were putting their plans for the pledge drive together and checked in with the **buildings & property care** committee.
- Even though this was another year of constant change and unexpected developments we did get good work done beyond immediate needs and I am looking forward to carrying this momentum into the next year when we'll have three new members.

## Financial Situation

As laid out in our [Final FY21 financial report](#) from last October, we concluded the last church year (FY21) with a deficit of ~\$9.5K well below the \$30K expected budget shortfall and entered this year with a well-funded stabilization fund.

When we created a balanced budget for this current church year back in April/May 2021, it looked like we could reasonably expect a regular church year since both Delta and Omicron had not been on the horizon. Thus it became clear pretty quickly that the goal of a balanced budget might not be achievable. However due to several factors, the expected budget shortfall is comfortably within range of the stabilization fund without depleting that fund to a level of worry.

The main negative financial deviations from the plan this year were:

- We expected a full **in-person** church year with all income that comes with it (offering, rent etc.)
- We could not run an **auction** in winter
- We had unexpected expenses due to **mold** damage and the need for **simulcast** equipment

On the positive side, we saw:

- An unexpectedly high amount of **Previous year donations** coming in late

- Savings from reduced usage of **committee** budgets due to the pandemic
- High fulfillment rates on the **capital campaign**

Overall, it looks like we will face a budget shortfall of ~\$7.5K for this church year (FY22) which will bring our stabilization fund to ~\$75.5K - still well above the minimum amount for the stabilization fund laid out in our new [operational reserve policy](#).

When we started planning the next church year (FY23), we started again from the assumption that the coming year will be a regular in-person full-program church year. One could argue that this assumption turned out to be a mistake for this year so should consider a different assumption? However, we do feel that it makes sense to start with this assumption since:

- The **pandemic situation** seems different now as spikes in case numbers no longer lead to the drastic measures that led to the church closing.
- If there would be a drastic change in the pandemic situation, it is justified to rely on the well-funded stabilization fund again as long as we plan with a **balanced budget** for the “regular church” assumption.

In the coming church year we do expect the pledge income to stay roughly level with the current church year as we have slightly declining numbers of pledge units eating into the generous increases by the people that do pledge. We hope that we can reverse the declining pledge unit trend - we have early indications that we’ll be able to grow again next church year.

The major changes we expect for the next church year are:

- Due to the inflation, a fair **cost of living** adjustment for our staff would need to be a 5.3% increase (UUA recommendation).
- Due to changes in the usage of the **Johnson House** we do expect roughly **\$25K** more rental income that next year (FY23) with even more increases on the horizon for FY24

These two will roughly level out so that we can continue with a balanced budget, paying our staff quite fairly and without any major changes in programming. This should allow us to fully re-engage with the congregation and potentially reconnect to the growth we saw before the pandemic.

It does mean that we will have to defer some causes we would have loved to invest in (Benefits, FCB Green, Instrument maintenance and UUA contributions). This can be read as that we need the next church year (FY23) to get the congregation fully up and running again and we expect to be able to plan the year after in a growth mode again with more rental income and increasing pledge unit numbers.

We are financially healthy in the sense that we can afford our current expenses sustainably. We'll have to look closely at the trends this coming church year in order to understand where and whether we can grow.

## Income & Expenses

### Last church year (FY21) - a moderate pandemic shortfall

The projection for the last church year that was presented as a projection at the last annual meeting was a budget deficit of ~\$19K which was \$10K better than the budgeted shortfall. In reality we could even save more money mainly on the utility bill and thus end up with a deficit of ~\$9.5K leaving our stabilization fund at ~\$83K.

### Current church year (FY22) - unplanned pandemic with limited damage

The detailed numbers this year are:

<b>First Church in Belmont, Unitarian Univ. - Belmont MA</b>			
<b>Projected Summary FY 22 from 5/21/2021</b>			
	<b>FY21</b>	<b>FY22</b>	<b>FY22</b>
	<b>Actual</b>	<b>Budget</b>	<b>Projected</b>
<b>Income</b>			
Current Year Donations	599,300	633,600	633,600
Prior Year Pledges	7,218	5,000	45,897
Other Donations	-	500	1,000
Offering Income	10,628	33,000	26,581
Rental Income	30,863	61,880	61,880
Income From Fundraisers	31,000	31,845	-

Investment and Interest Income	43,183	58,805	55,806
Other Operating Income	7,839	4,500	1,500
<b>Total Income</b>	<b>730,031</b>	<b>829,130</b>	<b>826,264</b>

	<b>FY21 Actual</b>	<b>FY22 Budget</b>	<b>FY22 Projected</b>
<b>Expenses</b>			
Personnel	553,254	564,552	571,552
Administrative	42,252	57,720	62,420
Simulcast Equipment			7,000
Buildings and Grounds	50,884	78,626	78,626
Debt Service	16,016	16,016	16,016
Utilities	14,744	30,300	27,000
UU and Other Organizations	31,006	38,360	38,360
Committees (Other)	4,880	12,900	5,000
Music Committee	23,088	21,265	21,265
Religious Education Children	3,459	5,700	5,000

Religious Education Youth	-	700	700
Other Ministerial Expenses	-	3,000	1,000
<b>Total Expenses</b>	<b>739,583</b>	<b>829,130</b>	<b>833,939</b>
<b>Income less Expenses</b>	<b>(9,552)</b>	<b>0</b>	<b>(7,675)</b>

Looking at the projections for this ongoing church year, a lot of things ended up different from the “pandemic-free” budget. In detail, these are:

- The late donations from last church year came out \$41K higher than expected
- The offering income was below expectations (no services in 2021)
- No auction and no major musical
- Personnel cost as expected (\$7K increase was budgeted under Admin)
- Admin cost much higher due to mold remediation cost
- Utilities did not benefit as much from non-use due to rising gas prices
- Committees spent less due to less activity

Overall, this year could have been quite costly since some of the savings due to the pandemic have not been as pronounced while the income from the auction and offering has created quite a bit less income. However, the generosity of the congregation in their late pledges from the previous year helped us to limit the damage to ~\$7.5K - an amount that we can cover from our stabilization fund with ~\$75K remaining for future years.

**Next church year (FY23) - Continued fair pay and level program funding**

Due to a ~5% reduction of pledge units the generous increase of pledges by the congregation is projected to lead to roughly the same number as for the current church year. While we assume an in-person year for next year again and can expect higher rent income (due to a change in the use of the Johnson House), inflation hits us hard as it comes to cost of living adjustments for the staff so a balanced budget does not allow a lot of new investments but allows us to comfortably continue to run the programs with minor investments here and there.

**First Church in Belmont, Unitarian Univ. - Belmont MA**

<b>Proposed Budget FY 23 DRAFT: 5/21/2021</b>			
	<b>FY21 Actual</b>	<b>FY22 Project.</b>	<b>FY23 Budget</b>
<b>Income</b>			
Current Year Donations	599,300	633,600	631,259
Prior Year Pledges	7,218	45,897	7,128
Other Donations	-	-	2,000
Offering Income	10,628	26,581	33,000
Rental Income	30,863	61,880	87,237
Income From Fundraisers	31,000	-	31,845
Investment and Interest Income	43,183	56,806	60,765
Other Operating Income	7,839	1,500	23,500
<b>Total Income</b>	<b>730,031</b>	<b>826,264</b>	<b>876,734</b>

	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>
	<b>Actual</b>	<b>Project.</b>	<b>Budget</b>
<b>Expenses</b>			
Personnel	553,254	571,552	611,152
Administrative	42,252	62,420	59,871
Simulcast		7,000	
Buildings and Grounds	50,884	78,626	76,626
Debt Service	16,016	16,016	11,585
Utilities	14,744	27,000	34,300
UU and Other Organizations	31,006	38,360	42,000
Committees (Other)	4,880	5,000	10,000
Music Committee	23,088	21,265	24,000
Religious Education Children	3,459	5,000	5,500
Religious Education Youth	-	700	700
Other Ministerial Expenses	-	1,000	1,000
<b>Total Expenses</b>	<b>739,583</b>	<b>833,939</b>	<b>873,613</b>
<b>Income less Expenses</b>	<b>(9,552)</b>	<b>(7,675)</b>	<b>0</b>

The details on the bigger changes to last year:

- We have to assume the high late pledge amount was a pandemic one-time event
- Other donations will now include credit card processing fee shares
- Offering income assumed to be pre-pandemic
- Rental income increase due to the new use of the Johnson house
- Fundraisers assume auction and moderate musical
- Other income includes \$10K from other churches in the Kids UUnited content sharing program, an intern grant from the UUA and money from an RE fund.
- Personnel includes the cost of living adjustment for all staff including the new intern and Janice’s reduction in hours as well as RE assistants
- Administrative has no mold remediation but insurance increases and \$5K storage rental needed for the Johnson house re-use
- We assume slight reduction of maintenance cost for the Johnson House
- Utilities assumed at current gas prices
- Financing cost is lowered due to refinancing (see below for details)
- The music committee can also pay the soloists fairly

### Summary

The next church year shapes up to be a financially solid year. It will allow us to pay our staff fairly even with the inflation and run our programs at level comfortably. It does not give us a lot of spending room for some investments / expenses we were hoping to be able to do around FCB Green, Staff benefits, UUA dues etc. but it’s fundamentally a financially healthy budget with some buffers to allow us to run programs as needed.

### Assets & Liabilities

The asset and liability situation at the church is as follows:

	3/31/2021	3/31/2022	Change
<b><u>Assets excluding real estate and committee balances</u></b>			
Regular funds			
Stabilization	\$ 92,769	\$ 83,214	\$ (9,555)
Building/window	\$ 57,674	\$ 69,491	\$ 11,817
Total	\$ 150,443	\$ 152,705	\$ 2,262



Endowment funds			
Investments in cash and securities	\$ 2,164,223	\$ 2,230,475	\$ 66,252
Loan to the church	\$ 152,977	\$ 144,415	\$ (8,562)
Total endowment funds	\$ 2,317,200	\$ 2,374,891	\$ 57,690
<b>Total assets</b>	<b>\$ 2,467,643</b>	<b>\$ 2,527,596</b>	\$ 59,952
<b><u>Long term liabilities</u></b>			
Loan from the endowment	\$ 152,977	\$ 144,415	\$ (8,562)
<b>Total liabilities</b>	<b>\$ 152,977</b>	<b>\$ 144,415</b>	\$ (8,562)
Net	\$ 2,314,666	\$ 2,383,181	\$ 68,515

Please note that the building fund will be getting increased by \$20K in May with the recently doubled annual set-aside.

In addition to the above, the church has a variety of accounts, each with the purpose of tracking the balance of funds where there is a difference between the timing of income and expenses. There are also accounts that are built up over time so as to plan for future expenses.

The Stabilization Fund, as mentioned earlier, helps us deal with unforeseen fluctuations in year-to-year financial results, and it serves as a first resource in the event of an emergency—such as a sudden loss of income caused by a pandemic.

### **The Endowment**

As you can see in the asset numbers above, the value of our assets has increased by a moderate amount. After last year’s dramatic gains by surging markets and the timing of our fiscal year, we are seeing limited growth this year as the markets have leveled out and the interest rates were low for the majority of the FY. The good news is that this shows that last year’s increase in value was not a fluke and that we did manage a 6% increase on the equities in a more difficult market.

## Summary

<b>Endowment Summary - 3/31/2021 to 3/31/2022</b>			
<b>Starting Value</b>	<b>\$2,317,200</b>		
Change in value of holdings		\$ 138,042	6.0%
Distributions		\$ (69,565)	-3.0%
Contributions		\$ 5,735	0.2%
Management Fees		\$ (16,521)	-0.7%
Net change		\$ 57,691	2.5%
<b>Ending Value</b>	<b>\$2,374,891</b>		

Allocation and performance data of our holdings are in the two tables below while the distributions are shown further down explaining the usage of the endowment income.

### Holdings allocation

<b>Investments</b>		<b>3/31/2022</b>				<b>Midpoint</b>
<b>Asset Class</b>	<b>Description</b>	<b>Amount</b>		<b>Allocation</b>		<b>Range</b>
<b>Cash &amp; Other</b>	Schwab Bank/MM	\$ 129,349		5.8%		5%
<b>Fixed Income (3)</b>		\$ 485,461		21.8%		25%

Domestic (4)		\$ 350,279		15.7%		18%
US Treasuries	2 Notes 3 Inf Idx		\$ 115,769		5.2%	
Corporate Bonds	11 Corp Bonds		\$ 234,510		10.5 %	
International	2 ETF Int. Bonds	\$ 135,182		6.1%		7%
<b>Equities (8)</b>		<b>\$ 1,615,665</b>		<b>72.4 %</b>		<b>70%</b>
Domestic (9)		\$ 1,212,521		54.4%		52%
Small Cap	7 Sector ETFs		\$ 223,439		10.0 %	10%
Large Cap	9 Sector ETFs		\$ 989,082		44.3 %	42%
International	6 Sector ETFs	\$ 403,144		18.1%		18%
<b>Total Schwab Investments</b>		<b>\$ 2,230,475</b>		<b>100.0 %</b>		<b>100%</b>

## Holdings performance

Investments		3/31/2022		3/31/2021		Annual Return	
Asset Class	Description	Amount		Amount		Actual (1)	Benchmark
Cash & Other	Schwab Bank/MM	\$ 129,349		\$ 122,993		0.0%	0.0% (2)
Fixed Income (3)		\$ 485,461		\$ 421,458		-4.1%	-5.3% (5)
Domestic (4)		\$ 350,279		\$ 322,252			-4.1% (6)
US Treasuries	2 Notes 3 Inf Idx		\$ 115,769		\$ 124,835		
Corporate Bonds	11 Corp Bonds		\$ 234,510		\$ 197,417		
International	2 ETF Int. Bonds	\$ 135,182		\$ 99,206			-7.9% (7)
Equities (8)		\$ 1,615,665		\$ 1,615,594		9.8%	9.3% (10)
Domestic (9)		\$ 1,212,521		\$ 1,240,467			11.9% (11)
Small Cap	7 Sector ETFs		\$ 223,439		\$ 255,752		
Large Cap	9 Sector ETFs		\$ 989,082		\$ 984,714		

International	6 Sector ETFs	\$ 403,144		\$ 375,127			1.6% (12)
<b>Total Schwab Investments</b>		\$ 2,230,475		\$ 2,160,045		6.0%	5.1% (13)

### Footnotes

- (1) Returns are gross of FL Putnam's fees
- (2) 30 Day T-Bill
- (3) Fixed Income equals Domestic plus International Fixed Income
- (4) 70% Bloomberg Barclays Intermediate US Govt/CR TR Index and  
30% Bloomberg Barclays Global Aggregate ex-US Index
- (5) Domestic Fixed Income equals US Treasuries plus Corporate Bonds
- (6) Bloomberg Barclays Intermediate US Govt/Cr Total Return Index
- (7) Benchmark is Bloomberg Barclays Global Aggregate ex-US Index
- (8) Equities equals Domestic plus International Equities
- (9) 75% Russell 3000 and 25% MSCI Developed EAFE Gross Total Return
- (10) Domestic Equities equals Small Cap plus Large Cap
- (11) Russell 3000
- (12) MSCI Developed EAFE Gross Total Return
- (13) 52.5% Russell 3000/ 17.5% MSCI Dev. EAFE/ 17.5% BB Intermediate  
US Govt/CR/ 7.5% BB Global Agg ex-US/ 5% 30 Day T-Bill
- (14) Adjustments are made from payments or distributions due at the  
end of the quarter but not yet transacted

### Distribution

## Endowment Distributions - 4/1/21-3/31/22

<b><u>Fund</u></b>	<b><u>Restrictions</u></b>	<b><u>% of total</u></b>	<b><u>Amount</u></b>
Miscellaneous	None/Income only	80.2%	\$ 55,806
Alfa Radford Legacy	Music Program	8.1%	\$ 5,617
Church Discretionary	Minister's discretionary use	6.7%	\$ 4,650
Penny Schafer	Flowers & Other	1.8%	\$ 1,237
Duesenberry	Major Music Service	1.6%	\$ 1,137
Wellington	CSB	0.2%	\$ 174
Bauer	Youth/young adult programs	0.4%	\$ 266
Foster	Youth programs	0.4%	\$ 245
Clark	Organ maintenance	0.3%	\$ 222
Farnham	Flowers	<u>0.3%</u>	<u>\$ 211</u>
<b>Total</b>		100%	<b>\$ 69,565</b>

### Loans

As we refinanced the loan against our own endowment in the course of paying the ventilation system, we kept the target date of the loan fixed and picked a more market appropriate rate. The financial data on this last outstanding loan is:

#### Investment Fund Ventilation Loan

Original amount      \$110,866

Date                      Apr-22

Interest rate            4%

Current balance        \$110,866

Payoff date            Apr-34

## **Outlook**

Looking forward, I do think our main focus will be to get an understanding of the new normal - hopefully starting with the next church year. Can we go back to the growth and participation numbers that we had pre-pandemic or will the pandemic have a lasting impact? Can we restart the growth and influx of new families joining us? While we have been conservative with our assumptions for the coming church year, the long term health of the church and the level of programs we can fund depends very much on how our first full in-person / full program year is going to shape up.

Beyond the pandemic driven trends over the last years, a longer time trend is that the congregation's donor base is aging slowly and while we have the privilege of a set of steadfast supporters that are always there when needed, we need to create a path for new stewards of the church and keep an eye on growth and integration / engagement of new members.

As in previous years, I want to close with a heartfelt thank you to all of our financial supporters. It is humbling to see the financial (and other) support from and for this community. It is an honor to help ensure sound usage of the financial part of this support.

Submitted by Stefan Frank, Chair

## **History Committee**

During 2021-22 the FCB History Committee, a relatively new ad-hoc committee under the umbrella of Adult Programs, has had a busy and full year. After our initial formation in early 2021 we spent several months discussing committee goals and program ideas. Over the summer 2021, we began a multi-year process of digitizing materials in the church archives to make them readily accessible to interested members. During the early fall, after the completion of the church's mold remediation process and with major support from committee member Lauraine Dalton, we completed a reorganization of the History Cabinet in our conference room as well as the shelving area of the Seth Gano Library. From November onward, the Committee has held virtual meetings on first Thursday evenings. We have also circulated a regular history blog sharing archival materials that relate to meeting topics. Over the past year, presentations and discussion sessions have addressed the following topics:

- Belmont and FCB during a time of transition and transformation: a look at the key

period of 1940-1965. This period of municipal growth and maturation in Belmont saw social change in the world at large, and important changes at FCB between the end of the pastorate of Rev. Henry Wilder Foote and the arrival of Rev. Gil Phillips.

- **A Look Across the Street:** We discussed Rev. Phillips's headline-generating October 1965 sermon addressing the nearby presence of the national headquarters of the John Birch Society. The JBS, an early right-wing advocacy organization, is recognized as the forerunner of today's reactionary and extremist political organizations.
- **The emergence of women in leadership at FCB in the 1970s-80s:** this panel discussion featured presentations by Committee members Nicole Bernstein, Bill Blumberg and Lanier Smythe on the important influence and lasting legacy of three key individuals, Rev. Marjorie Sams, Rev. Diane Miller and Rev. Alfa Radford.
- **Social Action at FCB:** this discussion focused on the expanding role of direct social service, social witness and stepped-up congregation-wide engagement in social outreach. Seen as a key feature of our church community in the modern era, social engagement was expanded greatly from the late 1970s forward, led by the formation of the Caritas Committee under the leadership of Rev. Marjorie Sams.
- **The final Committee activity of the year** returned the focus to FCB's earliest days, with a series of guided walks in May through Mount Auburn Cemetery. This treasured place, a local and national landmark, contains the final resting places of a great many of FCB's early leaders, who also played influential roles in the establishment of the new town of Belmont in the late 1850s.

In the coming year the Committee looks forward to exploring and deepening our understanding of several new topics of common interest to our members. As the church undertakes a general bylaw revision, we also plan to take a look at the place in our bylaw of our historic Ames Covenant, first adopted in 1900. We welcome interest and participation from all members of the FCB community as we seek to learn more about FCB's rich history from our archives, from each other, and through discoveries from other sources.

John Howe, Chair

## **House Committee**

Members: Heather Quay, Nate Rono, Jon Svetkey

We didn't do anything this year as the building was closed.

For next year, we hope to be included in projects related to the House Committee.

Submitted by Jon Svetkey



## **The Investment Committee**

### **Background**

The Investment Committee manages both the investments of and distributions from First Church's Investment Fund. The Investment Fund consists of charitable bequests, memorial funds, and specifically designated gifts given to First Church. The Investment Fund is established to support the long-range financial health of First Church, to help manage and survive financial emergencies and to fund capital needs and special projects that further the mission of First Church. The Committee works with F.L. Putnam, our investment manager, to direct the Investment Fund's investments and distributions in accordance with the Investment Guidelines, which are established by the Finance Committee, and any restrictions placed on gifts or bequests by their donors.

### **The Committee is appointed by the Finance Committee and consists of:**

Chair: Mark Thurber

Members: Jonathan Wolf and Scott Johnson

### **Activities and accomplishments during 2021/22**

This year, the Committee continued to meet remotely, primarily by email, in lieu of in-person meetings. In addition to periodic review of the performance of the Investment Fund, the Committee also worked with the Treasurer to coordinate financing issues related to the new ventilation system and the payoff of the existing building loan. The Committee also worked with the Finance Committee to establish an Operational Reserves policy for First Church. This spring, funds added to the Investment Fund included additional memorial gifts for the Penny Schafer Memorial Fund and a bequest that established the Trudy Eyges Fund.

Details on the performance of the Investment Fund will be provided at the annual meeting.

### **For the coming year, the Committee plans to:**

- Continue to keep the Finance Committee and Parish Board informed about the performance and strategy of the Investment Fund;
- Work to build awareness in the congregation about the Investment Fund and the work of the Committee;
- Continue to review the performance and investment objectives of the Investment Fund and coordinate with F.L.Putnam on any adjustment to the investment and distribution strategy;
- Work with the Treasurer on distributions from the Investment Fund to the operating budget and to various special restricted funds; and

- Integrate anticipated new membership on the Committee.

## **Membership Committee**

The committee is proud to have welcomed a large number of newcomers to First Church this year.

In the fall we organized “Journey to Membership,” our three-part series of workshops, which was held in person. Six newcomers to the church attended the workshops, all of them stepping inside the building for the first time. With the church reopening in the spring, bringing a wave of new folks to our community, we decided to defer the next round of workshops to next fall.

With the reopening of the church in early spring, the committee joined forces with the Outreach Committee and the Fellowship Committee to plan events together. The new “superteam” of three committees will be collaborating on social events and welcoming newcomers to the church.

In May the superteam organized an event for newcomers: a backyard dinner party hosted by Fatima Serra and Doug Massidda. It was attended by eighteen newcomers, including some of our new members who had joined during the pandemic, and a flock of eight children. It was delightful to see so many young families who have discovered First Church in the past year. Two of the new folks signed the membership book on the spot, and I anticipate several more will become members in time for the New Member Welcome on June 12.

At the time of writing, we have welcomed six new members to the congregation since the last Annual Report. They are Jeannette Gerzon, Alexandra Goho, Justin Hardy, Norah Piehl, Emily Wilson, and Nathan Wilson. We are very proud of the church’s new members, and we hope to welcome more before the end of the church year.

The Membership Committee is made up of Samuel Foster (staff liaison), Sara Oaklander, and Fatima Serra (chair). We want to thank Yasmin Azad, Ranganath Nayak, and Jennifer Roderick for their service on the committee during part of the church year. We also want to thank Jess Hausman, Martin Plass, and Donna Ruvolo for collaborating with the committee, and for helping to make the newcomer event such a success.

Submitted by Samuel Foster

## **Outreach Committee**

The Outreach Team inched back in the post-pandemic world with two external activities, a presence at an off-cycle Town Day in September, 2021 and “a back on cycle” Town Day event in May 2022 – both very successful opportunities for one on one engagement.

Outreach also staffed a “Welcome Tent” at all outdoor services, providing a colorful and welcoming destination for newcomers to chat and collect information about First Church, and set up a children’s play area and highlighted the family-friendly services on social media. As a member of the new Outreach/Membership/Fellowship “SuperTeam”, Outreach supported the new members welcoming events as well.

While the Outreach Committee did not formally meet in 2021-22, we communicated by email and also welcomed new event volunteers to participate in Town Day activities and the Welcome Tent. Looking to the next church year, Outreach will be exploring ways to make the after-service social hour easier to navigate for families with younger children.

Members:

Donna Ruvolo

Jess Hausman

June Lattimore

Cathy Olafson

Samuel Foster, Membership and Outreach Manager

## **Membership Database Committee**

I am continually grateful for the dedicated, conscientious efforts of Miriam Baker, Robin Hughes and Mary Ellen Tuccillo, who, along with myself, formed the active core of this year’s Membership Database Committee. This year’s efforts included support for our church’s use of F1 Giving, enabling online payments that automatically integrate with our Fellowship One database. I am grateful for Miriam Baker’s consistent weekly monitoring of F1 Giving to manually handle the cases where contributors do not automatically match against their record in Fellowship One. We expanded the use of Fellowship One Forms, enabling web registrations for church events with the ability to accept online payments. We were pleased to support online registrations for the Children’s and Youth Choirs with activity payments and uploads of COVID-19 vaccination forms. We also supported the online sale of Coffee House tickets. We did some research into Fellowship One integration with MailChimp but were disappointed to conclude that the available integration would not serve our needs. We strived to provide a reasonably quick turnaround in generating ad hoc reports for a variety of church needs. And lastly, we assisted the FCB Forward Committee in

generating pledge fulfillment letters and the Stewardship Committee in generating the annual pledge letters and forms.

We always have more to do than there are hours to do it in, but next year we hope to add the following initiatives to our ongoing efforts: (1) stay on top of keeping our church group rosters up-to-date (2) provide staff and lay leadership training as needed (3) expand participation in the Fellowship One church directory (4) create a detailed inventory of how we use Fellowship One for our church database needs.

Submitted by Lauren Crocker

## **Music Committee**

Bruce Kozuma and Eliza Burden, Co-Chairs

### **Our Mission Statement:**

The Music Committee supports the church's music program. Its aims are: To provide music that will set and sustain a mood for worship in the services, lending a spiritual and emotional backdrop to the spoken word; to engender a sense of community and spirituality among participants and listeners, in worship services, as well as in a wide range of other activities; to use music as a form of community outreach by providing opportunities for people of all ages to participate in, or enjoy musical performances that attract and sustain new church members and friends.

Due to the ongoing pandemic, FCB's Music program offerings continue to be limited, but this year marked the return to some in-person programming, including three mid-week Vespers services and eventually in-person Sunday services this winter. Youth Choir, Nova Choir and Senior Choir resumed rehearsals and service participation. While there was no Fall musical, Ian was able to gather a small group of youth to participate in *Pirates of Penzance* with performances scheduled for early June.

We are so grateful for Ian Garvie, as he continues to be an extremely capable leader in the community, collaborating creatively with our minister and other staff in coming up with new directions for the church despite all of the pandemic obstacles. Ian does a tremendous job helping to maintain the reputation of the church as a musically rich community that appeals to people of all ages. Assistant Music Director Simon Andrews has continued to provide terrific support and assistance to Ian this year and the music program has greatly benefited from his musical skills. One of the newest initiatives was to embark on Paul-Andre Bempechat's Artist-In-Residence status and his mission of recording all 22 Beethoven sonatas and an in-person concert.

Our professional soloists/section leaders are Kristin Fahning, soprano; Irina Kareva, alto; and Chuck Claus, baritone. The Tenor soloist position remains unfilled, since Davron Monroe departed last year. Kristin will be leaving us at the end of the year to pursue new opportunities.

The Music Committee this year consists of: Eliza Burden and Bruce Kozuma, Co-Chairs; as well as Jane Minasian, Jason Redi, Catherine Stalberg and Jon Svetkey. Newcomer Gitanjali Rege also joined the Committee in March.

For the second year in a row, we were unable to continue with our Major Music tradition at the church.

While we returned to hosting Second Friday Concert performances in November with a large showing, we had to cancel the remainder of the scheduled season due to a resurgence in Covid cases in the winter.

### **Music Funds:**

The Music Committee decides how disbursements will be used from several music funds. The Discretionary fund was used to purchase some N95 masks, as well as an Adobe subscription to continue to allow video editing when needed. The Duesenberry Fund was not used this year, as we were still unable to have a Major Music service. Funds from the Piano/Organ fund this year were used to tune pianos and other small repairs, as well as clean the quilted harpsichord cover that was discovered in the back of the sound closet. ARLME funds were used for purchasing singing masks, and shelves and supplies for the new music library.

Submitted by Eliza Burden and Bruce Kozuma, Music Committee, Co-Chairs

### **Nominating Committee**

Succession is important to the continued vitality of FCB. As co-creators of the culture of time and talent in our congregation, the NomCom is committed to vetting and nominating those in our midst who have the vision and ability to lead us into the future. We are proud of those on this year's slate of candidates who rose to the opportunities and challenges of guiding our path forward.

Our next year as a committee will be brightened by a more solid understanding of the roles and responsibilities we are helping to fill as well as a track record of past "asks" and results. Thanks to fun and accomplished monthly meetings, chaired by Richard Waring, co-chaired by Nicole Griffin, with Karsten Kueppenbender, Jeanne Widmer, Catherine Stalberg, and

Jonathan Wolf, we are so grateful to our beloved community for their offers of time and talent.

Richard Waring, Chair, Nominating and Recruiting Committee

## **Property Care Committee**

The committee year was most unusual as it looked after a closed building. Because the building was largely unused, it was possible to address several deferred maintenance tasks. We looked after the building envelope, investigating and repairing roof leaks in the area of the flat roof where the roof top air handling systems are situated and in the valley in the front of the sanctuary where the red slate meets the shingle roof of the 2004 addition.

Inside spaces were brightened with carpet cleaning, wood floor refinishing and fresh paint on the walls. Outside, the committee was able to improve access from the parking lot to the church offices and meeting spaces with a new ADA standard handicapped ramp.

## **Second Friday Concerts**

We were thrilled about being able to present live, in-person concerts in November and December 2021, after 20 months of online shows. We were extremely sad and disappointed when we had to cancel our January - June 2022 concerts.

Next church year, we're hoping for a whole season of in-person concerts.

Submitted by Jon Svetkey

## **Social Action Committee**

### **Mission:**

- Provide information and events to educate and inspire the FCB Community
- Provide opportunities for activism in global and local social justice issues

### **2021 SAC Four Pillars for Action:**

- Immigration and Refugees
- LGBTQ+ Rights
- UU the Vote
- Peace Activism

Leadership for 2021-2022: Laura Caputo, Eva Patalas, Fran Yuan

Meeting Attendance: 8 to 12 persons in attendance from monthly meetings on Zoom

Finances: Budget line item \$500 yearly

### **2021-2022 SAC Sponsored Events:**

#### **LGBTQ+ Renewal Program:**

FCB worked in concert with the Belmont LGBTQ+ Alliance; five of the seven Alliance Leadership Team members are FCB members. A Pride parade was held in June, 2021 which was supported and hosted by SAC among others. SAC was also involved in planning and hosting the Transgender Day of Remembrance (Nov. 20) to bring awareness to violence against transgender individuals. An installation with the names and pictures of this year's 40 transgender murder victims was placed on the Town Green interspersed with flags. The Youth Group was also involved in setting this up.

In January 2022, Ran Courant-Morgan, a Planned Parenthood educator, conducted a two-part workshop for church members entitled, Understanding Gender and Sexual Identity workshops, with Ran Courant-Morgan, a Planned Parenthood Educator, which was an introduction to vocabulary, gender neutral language, and different pronouns, and provided opportunities for skill building around this.

The SAC was also instrumental in the observation of Transgender Day of Visibility (March 31), for which a yard signs on the Belmont Center Town Green and posters in local business windows were displayed. These featured prominent transgender individuals. A panel of speakers was held at the library and through Rainbows Across Communities for this as well as for the Trans Day of Remembrance. Reverend Chris will also be holding a Sunday service focused on LGBTQ+ themes.

#### **Refugee Family: Connect Belmont Neighborhood Support Team:**

On January 15, the Sulaimani family arrived in Arlington. This was the culmination of several frenetic weeks of forming the Family Connect Belmont Neighborhood Support Team (NST) and partnering with the resettlement agency Ascentria in order to reunite two families that had left Afghanistan together 4 months earlier. This involved fundraising (over \$38,000 to date), galvanizing a dedicated group of volunteers (as many as 35, most from FCB), finding and setting up an apartment. Yet this was just the beginning.

Working with and getting to know this family of 5 – a mother, father, daughter (7), and two sons (11 and 17) – has been a joy. With the goal of helping them become self-sufficient,

Margaret Dunn, Gabby Garschina-Bobrow and Eva Patalas are leading the volunteers who work with the family to organize schooling and extracurricular activities for the children and English classes for the parents, figure out healthcare, benefits, budgets and banking get them started with utilities and basic technology, and guide them to obtaining employment. Cultural orientation has been a major component of the process, in both directions, with the family learning about life in America, and the volunteers learning about Afghan customs and traditions. There have also been many opportunities for fun events, such as swimming at the Boys and Girls club in Arlington, sledding on a snowy day and going to the Museum of Fine Arts as part of celebrating Nowruz.

We are grateful to the FCB community for their generosity and dedication to helping this hardworking family find their way in their new country.

Submitted by: Eva Patalas

### **UU the Vote:**

Priscilla Cobb and Kathryn Bonfiglio enlisted about 30 people who were interested in taking postcard actions throughout the year. They also focused on issues of Voting Redistricting. Through Reclaim the Vote, postcard campaigns, with many targeting Texas and Georgia, were conducted with thousands of postcards sent by volunteers.

### **Peace Activism:**

- Louis D. Brown Peace Institute 2022 Mother's Day Walk for Peace in May had a goal of raising \$1500. \$1185 has been raised so far with a collection plate had a Sunday service to take place later in May.
- UU Mass Action Advocacy Day: Members of the SAC attended this event which focused on Indigenous people, climate change, immigration justice, and incarceration/ solitary confinement bills.

### **Urban Ministry:**

Nancy Davis reported regularly on UM events and invited SAC members to attend.

### **Grow Clinic:**

We continued to encourage the congregation to donate directly from a list of suggested items. Lynn Anderson headed up Collection Drives held throughout the year.



## **FCB Green:**

Throughout this year FCB Green primarily focused on an initiative to get the church to commit to carbon neutrality by 2035. Commenced and led by Monte Allen, the FCB Green carbon-neutrality working group started last summer by having individual meetings with leaders of the Parish Board and the Finance Committee. Receiving a generally favorable response, the group then wrote a mission statement and did extensive research on specific strategies, projected costs, and what other churches or denominations have done. Meanwhile, the Parish Board developed a strategic plan that made a commitment to consider climate change in all major decisions. In February the working group met with the Parish Board officers who had read our document and decided that carbon neutrality would be added to the strategic plan. FCB Green will make an announcement at the Annual Meeting. The committee also is proud of other programs we co-sponsored such as David Deese's fall course on climate change, Priscilla Cobb's monthly "11th Hour Bell Ringing for Climate Justice", and repetition of the "40 for the Earth" commitments of congregation members.

FCB Green will take the first step toward implementation of carbon neutrality with weatherization of the church building through improved insulation that will yield greater energy efficiency. We also plan to launch programs on application of carbon neutrality to congregants' individual and household decisions. Furthermore we are looking forward to some programmatic collaboration with the Youth Group which has chosen climate change as the focus of next year's service trip. Another goal will be recruitment of new committee members.

Submitted by Downing Cless

## 2021 Belmont Pride Parade



## 2021 Trans Day of Remembrance





## Stewardship Committee

We appreciate the First Church congregation for “Embracing Our Moment” and continuing its financial commitment to our community. As of May 15, 2022, we have received 229 pledges totaling \$646,127, which is 98% of our \$660,00 goal.

We are very grateful to stewardship committee members Katharine Canfield, Susan Kobayashi and Brian Kopperl, who gave of their time, creativity and energy during this year of transition. We deeply appreciate our minister, Chris Jablonski, who is a true partner in the work of stewardship. We are thankful to Anjali Kumar, who served as a liaison between the committee and the Parish Board. Stewardship activities would not be possible without the tireless technology support of Lauren Crocker; tracking and reporting know-how of Mark Thurber; and ongoing coordination by Janice Zazinski. We also want to thank our talented CartUUn artists Nick Hausman, Asher Kopperl, Raeann Mason and Nate Sellers, as well as all those who gave such resonant testimonials during church services.

We hope for continued engagement and generosity by the congregation in stewardship. We hope that FY 2023 will bring a resumption of full church programming, with opportunities to increase membership and broaden the donor base.

Submitted by Susan Galli and Bruce Logan, Stewardship Committee Co-chairs

## **Transylvania Partner Church Committee**

I am most proud of the fact that despite the ongoing challenges of the pandemic, we were able to engage in meaningful work related to the partnership. Examples include monthly video and written introductions of community members and our annual Partner Church Sunday service.

I hope to be able to, at long last, host our partners and begin to plan our next trip to Desfalva.

Submitted by Livia Racz

## **Worship Committee**

We worked together in a rapidly changing (and challenging) landscape to ensure inspiring and meaningful worship services. Chris's leadership was stellar and we worked well together as a committee

We hope that worship can continue to be held within our sanctuary and in person. We look forward to using the town green for outdoor services and returning to Vesper services in the fall. As we emerge from the pandemic, we hope to continue to strengthen community involvement and our bonds to each other.

Submitted by Janet Amphlett