

## This Year, The Congregation Approved Our Values, Mission & Ends

### **Our Values:**

Authentic Connection  
Courageous Action  
Love  
Spirituality  
Wonder

### **Our Mission:**

Come as you are.  
Journey together in love.  
Act with courage.  
Transform our world.



### **Our Ends: Together we, across the lifespan:**

Connect to spirituality, joy and wonder in diverse worship and music experiences that develop lives of courage, meaning, hope, and love.

Articulate our individual and congregational Unitarian Universalist identity, deepen our understanding of it, teach it to our children, and live it in the world.

Foster an authentic intergenerational church community.

Welcome people in all their diversity and create belonging for one another.

Support one another in the joys, sorrows, and transitions of our life journeys.

Work in partnership, as individuals and as a congregation, to advance justice and put courageous love in service to our community and our world.

Honor our FRS and UU heritage as we journey together.

FIRST RELIGIOUS SOCIETY,  
UNITARIAN UNIVERSALIST

Newburyport,  
Massachusetts

# ANNUAL REPORT

Church Year 2020-2021

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# WARRANT AND MATERIALS TO SUPPORT THE ANNUAL MEETING

## Warrant

The Proprietors of the Pleasant Street Church and the members of the First Religious Society, Unitarian Universalist in Newburyport, MA are hereby notified to convene for a Special Meeting via Zoom on Sunday, May 23, 2021 at 10:30am, it being in the bylaws as amended, there and then, to act upon the following articles.

- Article 1:** To act upon the reports of the officers and committees.
- Article 2:** To act upon the recommendation of the Governance Committee for the election of officers and chairpersons.
- Article 3:** To act upon the recommendation of the Governance Committee and Parish Board to update the language for removal of members from the church roll, Article III, Section 2.
- Article 4:** To act upon the recommendation of the Governance Committee and Parish Board to update the bylaw language he/him/his/she/her/hers to gender neutral using the language they/them/their/theirs.
- Article 5:** To act upon the recommendation of the Parish Board that the First Religious Society, Unitarian Universalist in Newburyport make a formal commitment to continuing to serve as a ministerial internship teaching site.
- Article 6:** To act upon the recommendation of the Governance Committee to suspend certain assignments of responsibility to the Finance Committee, by the Bylaws, Article IX, Section 7.
- Article 7:** To act upon the recommendations of the Trustees of the Endowment to restrict investments in, or where necessary, divest existing investments in, two additional classes of companies: Civilian Firearms and Controversial Weapons.
- Article 8:** To act upon a request from the Business Administrator and the Finance Committee for approval of expenses to be drawn from the Bailey Fund not to exceed \$12,000 for furnace repairs to be performed (via contractor to be determined), along with \$5,450 to cover the costs of the roof replacement performed earlier this year, and any extraordinary facilities expenses of up to \$3,000 in conjunction with the re-opening of FRS buildings.
- Article 9:** To act upon the Fiscal Year 2022 budget recommended by the Parish Board.

We the undersigned hereby certify that we have notified the Pleasant Street Church and the members of the First Religious Society, Unitarian Universalist in Newburyport, MA to meet at the time and place, and for the purpose set forth in the Warrant by posting the same in the church eight (8) days (including two Sundays) before the day of the meeting.

Maureen Adams	Juliana Beauvais	Rebecca Brodish	Holly Cashman
Micah Donohue	Vern Ellis	Judy Fayre	Rich Johnson
Tom Himmel	Michelle Kimball	Forrest Speck	Renée Wolf-Foster
Sadie Fountain			

A copy of the Warrant attest



Holly Cashman, Clerk of the Parish

## **Motions & Additional Information on the Articles**

### **Article 1: To act upon the reports of the officers and committees.**

*I move that all reports of officers, ministers, lay leaders, staff, committees, teams, and other groups as printed in the Annual Report 2020-2021 be accepted.*

### **Article 2: To act upon the recommendation of the Governance Committee for the election of officers and chairpersons.**

*I move that the slate of officers and chairpersons as presented in the Annual Report be elected.*

#### Explanation:

See slate of officers presented by the Governance Committee contained herein.

### **Article 3: To act upon the recommendation of the Governance Committee and Parish Board to update the language for removal of members from the church roll, Article III, Section 2.**

*I move that in the Bylaws, Section 3 be added to Article III to allow for routine updating of the membership roll.*

#### Explanation:

Some members are now participating in FRS from afar, so location should not be determinative of ability to be a member in good standing.

Removal of inactive members from the church roll can be delegated to the Parish Board via this updated bylaw, allowing more routine updating of the membership roll.

#### Current Language:

Section 2. A member's name will be removed from the membership roll upon the member's death or the written request by the member to the Clerk. After a member has left the Newburyport area for more than one year or has not participated in the life of the Church for a period of more than two years, such person will become a candidate for removal from the membership roll after a vote of the Parish.

#### Proposed Change:

Section 2. A member's name will be removed from the membership roll upon the member's death or the written request by the member to the Clerk.

Section 3. After a member has not participated in the life of the Church for a period of more than two years and has not responded to outreach by the church office, such person will be removed from the membership roll after a vote of the Parish Board.

### **Article 4: To act upon the recommendation of the Governance Committee and Parish Board to update the bylaw language he/him/his/her/hers/she to gender neutral using the language they/them/their/theirs.**

*I move that the proposed bylaw amendment to Article IV, Section 4, Article V, Section 1, Section 2, Section 3b, Section 3e, Article VIII, Section 3, Article XII, Section 4 be made to replace he/him/his and she/her/hers with they/them/their/theirs.*

Explanation:

As our understanding of gender has evolved, it is necessary to modernize the language of the bylaws to replace pronouns which limit gender with pronouns that allow for more inclusive interpretations of gender. The Board supports this alteration of the language of our bylaws for the use of gender-neutral pronouns.

Proposed Changes:

ARTICLE IV

Meetings

Section 4. Ten percent (10%) of the membership or 30 members, whichever is greater, shall constitute a quorum at most meetings of the Society. Twenty percent (20%) of the membership or 60 members, whichever is greater, shall constitute a quorum for the annual meeting, or for amending the Constitution and Bylaws. Twenty percent (20%) of the membership or 60 members, whichever is greater, shall constitute a quorum for any other duly constituted meeting to conduct business regarding contracts with the minister or to approve expenditures of more than \$25,000. The quorum necessary to call a minister or terminate their tenure shall be thirty-three percent (33%) of the membership. The quorum necessary to dissolve the Society shall be thirty-three percent (33%) of the membership.

ARTICLE V

The Minister

Section 1. The Minister shall be responsible for the conduct of worship within the church and the membership's spiritual interests and affairs. The Minister shall provide leadership in the role of executive chief of staff. The Minister shall have freedom of the pulpit as well as freedom to express their opinion outside the pulpit. The Minister shall have their ministerial credentials with the Unitarian Universalist Association thus ensuring their commitment to professional ethics as indicated by the Unitarian Universalist Ministers Association Code of Ethical Practices.

Section 2. The Minister shall be a nonvoting, ex-officio member of all boards and committees of the church, except for the Governance Committee of the Parish Board, on which they shall not serve.

It shall be the duty of the Minister to bring to the attention of the Parish Board any matters which seem to them pertinent to the present welfare of the church, and to make such recommendations as seem to them proper. However, the final decision in matters of policy shall remain with the Parish Board or a legal meeting of the Society.

Section 3. When a settled minister vacancy occurs, a Ministerial Search Committee shall be elected by the membership from a slate of candidates presented by the Parish Board after seeking input from the membership.

- a. The Minister shall have indefinite tenure.

- b. The quorum necessary to call a Minister or terminate their tenure shall be thirty-three percent (33%) of the membership (as per ARTICLE IV, Section 4).
- c. The church may choose a new Minister by a ninety percent (90%) vote of the members present at a special meeting called for that purpose.
- d. The church may terminate the Minister's tenure by a three-fourths vote at a special meeting called for that purpose.
- e. The Minister may resign at any time giving at least three months' notice to the Parish Board, or upon any period of notice mutually agreeable between the Minister and the Parish Board. In the event the Church terminates the Minister's tenure, they will be given at least three months' notice.

## ARTICLE VIII

### Trustees of the Endowment

Section 3. The Treasurer shall have the authority to sign necessary documents for the Trustees of the Endowment and in their absence, the Chairperson of the Trustees of the Endowment may sign for the Trustees.

## ARTICLE XII

### Leadership Council

Section 4. The Minister or their designee shall serve as Chairperson of the Leadership Council.

**Article 5: To act upon the recommendation of the Parish Board that the First Religious Society, Unitarian Universalist in Newburyport, MA make a formal commitment to continuing to serve as a ministerial internship teaching site.**

*I move that we, the First Religious Society, Unitarian Universalist in Newburyport, MA confirm our formal commitment to continuing to serve as a ministerial internship teaching site.*

### Explanation:

The Parish Board strongly supports this commitment to continue to serve as a learning congregation as fulfilling our mission and our values.

"Becoming an Internship Site," Unitarian Universalist Association Internship Manual:

*A congregation or community-based setting considering becoming an internship site should first determine if they are ready to enter into a partnership with an intern and the UUA (and sometimes a theological school) to provide a meaningful internship experience. In consideration of the time and commitment required to provide a quality internship, a congregation or community-based setting should be deliberate in the decision making. Interns are looking for sites that will empower them to function in roles of ministry appropriate to their goals, objectives and needs. The congregation or community-based site is expected to give the intern direct ministerial responsibilities, almost as if they were an assistant minister or chaplain, and engage the intern in a wide range of ministerial duties, including worship, religious education, pastoral care and counseling, programming, institutional management and finance, program development, and community and social action.*

*A good teaching site:*

- *is dedicated to excellence in ministry*
- *perceives the formation of ministerial interns as part of its mission*
- *gives an intern the opportunity to make a significant contribution*
- *enables an intern to pursue learning goals in a supportive atmosphere*
- *provides opportunities for a variety of professional experiences*
- *understands the value of Unitarian Universalism in the larger community*

**Article 6: To act upon the recommendation of the Governance Committee to suspend certain assignments of responsibility to the Finance Committee, by the Bylaws, Article IX, Section 7.**

*I move that the Bylaws, Article IX, Section 7, be suspended for one year until June 30, 2022.*

Explanation:

On recommendation of the Governance Committee and Parish Board, this motion suspends the Finance bylaw Section 7 for another year and allows the continuance of the Stewardship Team to continue to pilot a stewardship model for the future.

The Board continues to believe that separating the Stewardship efforts of FRS from the Finance Committee is the right path forward. We began a Stewardship consulting project with Mark Ewert this past year, which will continue into next year. Our recommendation is to move forward with the bylaw change next year when we will have a new Business Administrator and a new Stewardship Chair in place.

**Article 7: To act upon the recommendations of the Trustees of the Endowment to restrict investments in, or where necessary, divest existing investments in, two additional classes of companies: Civilian Firearms and Controversial Weapons.**

*I move that we, the First Religious Society, Unitarian Universalist in Newburyport, MA, act upon the recommendations of the Trustees of the Endowment to restrict investments in, or where necessary, divest existing investments in, two additional classes of companies: Civilian Firearms and Controversial Weapons.*

Explanation:

In accordance with FRS' ongoing efforts to conduct the affairs of the congregation consistent with our stated values, the Trustees of the Endowment ask for concurrence with their recommendation to restrict investments in, or where necessary, divest existing investments in, two additional classes of companies:

1) **Civilian Firearms** - Defined as companies that derive greater than five percent of revenue from the manufacture of civilian firearms; or greater than 15 percent of revenue from the retail sales of civilian firearms,

and,



2) **Controversial Weapons** - Defined as companies that manufacture cluster munitions, land mines, nuclear or biological/chemical whole weapons systems or components; or nuclear or cluster munitions delivery platforms; or depleted uranium weapons; regardless of the revenue derived.

As a reminder, the Trustees are congregation members who oversee the church's endowment funds. The endowment funds provide annual income to support church operations and outreach with social justice, capital improvements to the buildings, and cash for the annual budget. Investment policy in the endowment funds is restricted against companies involved in fossil fuel production and tobacco stocks, and screened for overall environmental, social, and governance (ESG) management policies. The Trustees work to increase the value of the endowment to keep pace with inflation and provide a reliable source of annual funds for church operations.

**Article 8: To act upon a request from the Business Administrator and the Finance Committee for approval of expenses to be drawn from the Bailey Fund not to exceed \$12,000 for furnace repairs to be performed (via contractor to be determined), along with \$5,450 to cover the costs of the roof replacement performed earlier this year, and any extraordinary facilities expenses of up to \$3,000 in conjunction with the re-opening of FRS buildings.**

*I move that the request to draw on the Bailey Fund to cover the cited expenses for furnace repairs, roof repair, and extraordinary expenses in conjunction with re-opening FRS buildings be approved.*

Explanation:

The furnaces in both the Meeting House and Parish Hall need repair to support the heating needs for next winter. The more significant work is needed for the Meeting House furnace: the main system pump needs to be replaced along with a water vent, air vent, and the relief valve. The furnace in Parish Hall has been leaking, making it necessary to replace steam piping, valves, and other parts including a low water cut-off for safety. We have detailed estimates in hand from one reputable contractor for parts and labor totaling approximately \$10,000. We are requesting approval for a not-to-exceed total of \$12,000 should the needs or the labor turn out to be more extensive.

Replacement of the leaking roof over the choir room in the Meeting House was done this past December 2020 at a cost of \$5,450; monies from the Bailey Fund are sought to reimburse this unexpected capital expense which had to be paid out of the operating budget.

Reopening of the FRS buildings is expected to entail some unexpected expenditures. While some might appropriately be covered out of operating expenses as "maintenance," there may be some that are relatively extraordinary and necessary to ensure a safe interior environment, such as air purifiers.

**Article 9: To act upon the Fiscal Year 2022 budget recommended by the Parish Board.**

*I move that the Fiscal Year 2022 expenditure budget as presented in the Annual Report be approved.*

Explanation:

Refer to the submitted budget contained herein.

## Nominations for the Parish Board, Officers, and Trustees of the Endowment

Nominees for the Parish Board, Officers, and Trustees of the Endowment for the 2020-2021 Church Year are highlighted in gray below.

**Parish Board members** are typically elected to three-year terms. **Officers**, which include the Finance Chair, Governance Chair, Endowment Treasurer, Finance Treasurer, Parish Clerk, Moderator, and Auditor are elected to one-year terms. **Trustees of the Endowment** are typically elected to three-year terms. **Delegates** are elected to represent the congregation at the UUA General Assembly.

Position	Term Length (Years)	Name	Nominee or Incumbent	Entering What Year in Office
Parish Board	3	Jim Supple	N	1
Parish Board	3	Tina Benik	N	1
Parish Board	3	Annie Maurer	N	1
Parish Board	3*	Holly Cashman	N	3
Parish Board	3	Minnie Flanagan	N	3
Parish Board	3	Vern Ellis	I	3
Parish Board	3**	Lucy Litwin	N	2
Parish Board	3	Renée Wolf-Foster	I	2
Parish Board	3	Michelle Kimball	I	2
Finance Chair	1	Tom Himmel	I	2
Governance Chair	1	Juliana Beauvais	N	1
Endowment Treasurer	1	Kim Kenly	I	1
Finance Treasurer	1	Micah Donahue	N	1
Parish Clerk	1	Kathy Desilets	N	1
Moderator	1	Lea Pearson	I	3
Auditor	1	TBD	N	1
Trustee	3	Cecilia Healy	N	1
Trustee	2	Bill Clary	I	2
Trustee	3	Susan Ricker	I	2
Delegate 1				
Delegate 2				
Delegate 3				
Delegate 4				
Delegate 5				
Delegate 6				
Delegate 7				
Delegate 8				
Delegate 9				
Delegate 10				

\*Holly Cashman, who served on the Parish Board as Parish Clerk June 2020-2021, is nominated for a one-year term, beginning in July 2021.

\*\*Lucy Litwin, serving for a one-year term, beginning in July 2021.

## **Nominee Profiles**

### **Holly Cashman** [Parish Board Chair]

Holly Cashman joined FRS in 2017. Originally from Cheshire, CT, Holly has lived in Frederick, Maryland; Ann Arbor, Michigan; Tempe, Arizona; and Newmarket, New Hampshire before settling in Newburyport in 2012, although she traces part of her family tree to nearby Salem and Topsfield, Massachusetts in the late 17th century. She lives with her wife Heather Nestor, who is also an FRS member, and their two rescue dogs, Fenway (a chocolate lab mix from Alabama) and Tula (a golden retriever mix from China). Holly enjoys cooking and baking, and like so many people has gotten into baking sourdough bread during the pandemic. She and Heather completed the IPA 5K series of three races last year (virtually) and are training to do so (in person, hopefully) again this year. Professionally, Holly is a professor of Spanish (linguistics) and Women's and Gender Studies at the University of New Hampshire, starting her last year of two terms as Chair of the Department of Languages, Literatures, & Cultures in the fall. Her research and teaching interests include multilingualism, gender and sexuality, intercultural communication, and conversation analysis. She is currently serving as the FRS Parish Clerk for the 2020-2021 Church Year.

### **Annie Maurer** [Parish Board]

Annie Maurer is a lifelong Unitarian Universalist who has attended the First Religious Society since the mid-nineties when she moved to Newburyport from North Andover. Over the years she has taught Young Church, worked on the Adult Education and Community Human Services committees, and chaired the Justice Action Ministry and Program Council as well as participated in the Friday Book Group. She served on the Parish Board and was Board Chair during the steeple renovation. She spent her professional life working at St. Ann's Home, a residential treatment and day school for troubled children and served as teacher's assistant, teacher, long term substitute, and Curriculum Specialist. Since retirement, she has served on the boards of the Newburyport Council on Aging and Small Solutions, a group that supports technology education for children in Kenya.

### **Cecilia Healy** [Trustee]

Cecilia Healy joined FRS in the 1990s during a time she and her husband Paul were renovating their home on Plum Island and commuting to their jobs in Waltham. She is retired from over 30 years with computer companies, traveling to various US states and Europe for customer support. After retirement she has devoted approximately 20 years to helping working parents care for their children. She will happily regale you with stories of her "baby families." She has volunteered with Young Church and in the church nursery. Cecilia has served on the Parish Board which also entailed running the Trustee meetings when she was the Parish Chair. As a current board member of The General Charitable Society of Newburyport, she has also served as its Assistant Treasurer. She is pleased to watch the FRS evolve with its outreach and programs. Cecilia and Paul are especially grateful for the immense efforts to make Sunday church participation arrive in our homes during this pandemic period.

### **Tina Benik** [Parish Board]

Tina Benik joined FRS in 2019 after moving to Newburyport in 2018 with her husband Greg. Although new to UU, Tina felt an immediate inner connection and sense of homecoming as she got to know FRS. This sense of connectedness, belonging, and purpose was further strengthened as she participated in some of the myriad FRS offerings - Fellowship Dinner, Chalice Circle, Care Pod, "Seeing White"

discussions, End of Policing Study Group, the Anti-Racist Initiative and the current VME Core Group. Tina is a lawyer who currently serves as General Counsel to a family-owned manufacturing and engineering company on the North Shore. In her quiet time, Tina enjoys reading, meditation, cooking, and birdwatching.

**Juliana Beauvais** [Governance Chair]

Juliana Beauvais joined FRS in 2016. She regularly serves as a campaign steward and has assisted with the visitors' table and used book sale. Raised in Northern Virginia, Juliana grew up attending Accotink Unitarian Universalist Church and became a member as a young adult. She moved up North ten years ago, eventually settling in the lovely Newburyport with her cats. Juliana enjoys skiing, hiking, going to the beach, and traveling. Professionally, Juliana works from home as a technology industry analyst. Juliana is humbled by the perseverance of the FRS community and is grateful to have a spiritual sanctuary, be it virtual or physical.

**Micah Donahue** [Parish Board Treasurer]

Micah Donahue joined FRS with his family in 2013 after attending services incognito for approximately two years. Originally from Bar Harbor, ME with time spent in Ithaca, NY and Minneapolis, MN, Micah now lives in Newburyport's North End with his wife Kristen and their three children ages 8-13. Micah loves hiking, snowboarding, DIY projects, craft beer, and spending time with family and friends. Professionally, Micah is an SVP, Media Director at Carbon, a marketing firm headquartered in downtown Newburyport, where he advises clients such as Rockport Shoes, Hubspot, Super Coffee, and AeroFarms. Micah is excited to add Finance Treasurer to his FRS experiences on the Parish Board, the Governance Committee, and as a temporary Buildings Liaison this past year.

**Jim Supple** [Parish Board]

Jim Supple is the founder and the principal Executive Coach at Great Marsh Consulting, LLC. Jim brings more than 35 years of successful business leadership and team building experience to his coaching practice. Before forming Great Marsh, Jim had a long career in the financial services sector, working the last 25 years with Fidelity Investments, where he served as Executive Vice President of Financial Advisor Solutions from 2009 until his retirement in 2015. In this role, he managed a large, multi-site team, directed the transformation of key client facing units, and built innovative and successful investment solutions all during a time of turbulent financial markets. His teams consistently had high levels of client and associate engagement as well as financial results. Jim is a Trustee and Vice Chair of the Boston Arts Academy, a public high school in the City of Boston dedicated to the education of artists, scholars, and citizens. He is a former member of the CEB Global Leadership Council, the Investment Company Institute (ICI) Sales and Marketing Council, and the Parents' Council at Macalester College in St. Paul, Minnesota. Jim and his wife Mary McDonald are the parents of four adult children, grandparents of two, and live in Newburyport, Massachusetts. He is a graduate of Boston College. For the past two years Jim has served as Trustee of the Endowment, and as Endowment Chair for the 2020-2021 church year.

**Lucy Litwin** [Parish Board]

Lucy Litwin was dedicated at FRSUU in 2004 and has grown up in the congregation. Lucy's involvement with the FRSUU community has grown since the Youth Group trip to the Pine Ridge Indian Reservation. She has been an active member of the Youth Group where she has made many friends. Lucy lives with her parents Patrice and Peter, her sister Ilise, and their dog Trixie, in Amesbury. She loves

experimenting with new baking and enjoys reading. Lucy attends Amesbury High School and is entering her senior year. She is looking forward to exploring colleges and new cities. Lucy is excited to take on her responsibilities as a Parish Board member and to continue to be an active member of the congregation.

**Kathy Desilets** [Parish Clerk]

Kathy started attending FRS shortly after moving to Newburyport from Nashua, NH almost nine years ago. She had been a member of other UU Churches (in Haverhill, MA and Nashua, NH) after being introduced to Unitarian Universalism when the Lowell UU Church provided space for a food coop that she was involved with as part of a variety of community organizing activities in Lowell. Since joining FRS, Kathy has had links with the Justice Action Ministry, and facilitated a Chalice Circle. Through FRS she found her way to The Alternatives to Violence Project, which has become another spiritual home for her. Kathy has worked in a variety of social service-related and public health settings, including sex education, family planning, domestic violence, and community mental health, and has served on a number of community boards.

**Marguerite “Minnie” Flanagan** [Parish Board]

Minnie Flanagan first came to FRS in 2014, drawn in by Buddhist group Thoughtful Life Studies and, soon thereafter, joining the choir. The magic happened the minute she walked in the door of our beautiful, light filled church, rich in its history and architecture. Having recently discovered ancestral roots in relation to one of Newbury’s First Settlers, FRS instantly felt like home and continues to be a place of refuge, wonder, and all things good. Minnie joined FRS in 2016, as Rev. Harold Babcock and then-Music Director Jay Lane were moving on, eager to make the commitment in the embrace of these extraordinary leaders. She continues to sing with the choir and sits in Buddhist Practice with Dharma Teacher Joyce Haydock in Monday night meditation. She has participated in a number of wonderful groups, including Chalice Circles, Spiritual Direction, Parish Friends, and the FRS Addictions Support Team and has enjoyed various illuminating and challenging classes. Minnie is a retired social worker, having found her calling in working with families, children, and adults in Child and Adult Protective and Preventive Services, Foster Care, and Senior Programs in her Westchester County, NY home of origin. A dedicated “front line worker,” Minnie climbed the Civil Service ladder only to twice take demotions back to “the field” to work directly with folks who found themselves involuntarily delivered into “the system.” Retired for eight years, Minnie loves her Plum Island home, where she lives with her two canine companions, her dear friends, and many new activities. Her grown children and grandsons live in South Florida and New York. They’re together as often as they can be.

## Minutes of the FRS Annual Meeting of May 31, 2020

Via Zoom

Present: Justin Murphy-Mancini, Director of Church Music, acting as Zoom host and tech engineer for the meeting; Lea Pearson, Moderator of the meeting; 147 participants

### Call to Order

Justin Murphy-Mancini announced that we would hear the wonderful church bell ringing to be virtually present with all of us.

Moderator Lea Pearson introduced herself, announced that we have a quorum, and called the meeting to order at 11:54am.

Lea Pearson turned the floor over to Rev. Rebecca Bryan for the chalice lighting.

Rev. Rebecca lit the chalice and read the chalice lighting for the Annual Meeting. She read the list of FRS members who have died since the last Annual Meeting and lit an additional candle in recognition of the racial injustice and violence that is happening in the country. She corrected an error made in a letter to the congregation and thanked everyone whose work has gone into the planning of the Annual Meeting in the Zoom format including Justin Murphy-Mancini, Nicole Salemi, Kristen Fehlhaber, Karen Young, Rebecca Brodish, and members of the Parish Board. She thanked everyone for showing up for the meeting. Rev. Rebecca acknowledged the departing Parish Board members Kim Kenly, Art Henshaw, Ann Haaser, Jason McLin, and Karen Young.

Moderator Lea Pearson echoed Rev. Rebecca's words about members showing up and encouraged all to keep their hearts and minds open for this entirely new format for the Annual Meeting. Lea Pearson presented the Zoom etiquette for the meeting, and thanked Diane Carroll, Nicole Salemi, and Karen Young for their support. She explained the process for dealing with technical issues and for voting in the virtual meeting format. She encouraged everyone to please stay until the end of the meeting so that we could maintain our quorum.

Each article was then presented and voted on in turn. Following is a summary of the action on each.

### Vote on the 2018 and 2019 Minutes

Moderator Lea Person announced that we have seven articles on the warrant, but the first order of business is to approve the minutes of the last two years' meetings, as this was inadvertently left off the agenda.

The following motion was made by Karen Young and seconded by Rebecca Brodish.

**Motion:** *"I move that the 2018 and the 2019 Annual Meeting minutes and the two 2019 Special Congregational Meeting minutes contained in the 2019-2020 annual report be approved."*

**Discussion:** None. (A few members accidentally raised hands allowing Justin to share the procedure of unmuting, accepting being unmuted, asking a question, and lowering hand/re-muting.)

**Vote:** The motion passed.

### **Article 1: To act upon the reports of the officers and committees.**

The following motion was made by Juliana Beauvais and seconded by Vern Ellis.

**Motion:** *"I move that all reports of officers, ministers, lay leaders, staff, committees, teams and other groups as printed in the Annual Report 2019-2020 be accepted."*

**Discussion:** Sally Benjamin shared her appreciation for all the work that went into the Annual Report, which she said was well written and was a pleasure to read. (One member calling in did not have a question and raised hand in error.)

**Vote:** The motion passed unanimously.

## **Article 2: To act upon the ordination of member Sophia Lyons.**

The following motion was made by Rebecca Brodish and seconded by Karen Young.

**Motion:** *"I move that the members of the First Religious Society, by the power of their congregational polity, vote to ordain Sophia Lyons as a Unitarian Universalist minister."*

**Discussion:** Rev. Rebecca Bryan shared that this is one of the most honorable, exciting, and empowering responsibilities and privileges a congregation has and she cannot imagine a human being more worthy of being a minister at this time in our association than Sophia Lyons.

**Vote:** The motion passed (with 0 nays, 1 abstention).

The Moderator invited Rev. Rebecca to give us a moment of spiritual centering. Rev. Rebecca encouraged everyone to keep going and said that we were doing great. Lea Pearson encouraged everyone to allow a deep breath.

## **Article 3: To act upon the recommendation of the Governance Committee to suspend certain assignments of responsibility to the Finance Committee, by the Bylaws, Article IX, Section 7.**

The following motion was made by Kim Kenly and seconded by Juliana Beauvais.

**Motion:** *"I move that the Bylaws, Article IX, Section 7, be suspended for one year until June 30, 2020."*

**Friendly amendment:** Karen Young made the amendment that the date in the motion should be June 30, 2021. KC Swallow confirmed that if the maker of the motion accepts the friendly amendment, the original motion does not need to be voted on. Kim Kenly accepted the amendment.

**Motion:** *"I move that the Bylaws, Article IX, Section 7, be suspended for one year until June 30, 2021."*

**Discussion:** Kim Kenly spoke to the motion briefly providing context and background.

There was no further discussion.

**Vote:** The motion passed unanimously.

After the vote, Kim Kenly thanked Lark Madden for his work on this, and encouraged everyone to thank him.

**Article 4: To act upon the recommendation of the Governance Committee to amend certain language in Articles VI, VII and VIII of the Bylaws as it relates to the division of the role of the Treasurer into two new roles, Finance Treasurer and Endowment Treasurer.**

The following motion was made by Art Henshaw and seconded by Frances McLaughlin.

**Motion:** *"I move that the congregation adopt the changes to the Bylaws as described in the information and table contained herein titled 'Proposed Bylaw Change: Creating two distinct Treasurer roles, the Finance Treasurer and the Endowment Treasurer, where the current Bylaws include one Treasurer of the Church,' for the reasons outlined therein."*

**Discussion:** Art Henshaw spoke to the motion briefly providing context and background.

There was no further discussion.

**Vote:** The motion passed unanimously.

**Article 5: To act upon the recommendation of the Governance Committee for the election of officers and chairpersons.**

The following motion was made by Maureen Adams and seconded by Micah Donahue.

**Motion:** *"I move that the slate of officers and chairpersons as presented in the Annual Report be elected."*

**Discussion:** No discussion.

**Vote:** The motion passed (with 1 nay, 0 abstentions).

Moderator Lea Pearson invited Rev. Rebecca to say something if she wished. Rev. Rebecca thanked everyone for being/staying in the meeting and invited anyone who felt the need to stand, to stretch and to go into that deep well within as we continue with the meeting.

**Article 6: To act upon the Fiscal Year 2021 budget recommended by the Parish Board.**

The following motion was made by Kim Kenly and seconded by Karen Young.

**Motion:** *"I move that the Fiscal Year 2021 expenditure budget of \$711,828.00 as presented in the Annual Report be approved."*

**Discussion:** Kristen Fehlhaber spoke to the motion to provide context and background. She thanked Steve and Eileen Costello for leading the annual campaign and thanked everyone who pledged. Stan Barrett, Nancy Peace, Leslie Lawrence, Merryll Maleska Wilbur, Betsy Hazen, Jessica Brown, Karen Young, and Rev. Rebecca Bryan asked questions or made comments related to the budget and pledges.

**Vote:** The motion passed (with 0 nays, 2 abstentions).

**Article 7: To act upon any other business that may legally come before the Parish.**

Lea Pearson asked if there was any other business and asked anyone with other business to raise their hand using the Zoom function. KC Swallow commented that this article is always on the warrant, but the rules of the meeting say that nothing can come before the meeting that is



not in the warrant. In other words, nothing can legally come before the Parish. She encouraged us to look into why this article is included. Lea Pearson encouraged the Governance Committee to look into this. Sally Benjamin commented regarding how in town meetings this article has been used.

**Motion:** No motion was made.

**Discussion:** n/a

**Vote:** There was no vote.

### **Motion to Adjourn**

Parish Board Chair Karen Young moved that we adjourn. The motion was seconded by Rebecca Brodish. There was no discussion. The motion was passed.

### **Closing Words**

Rev. Rebecca Bryan extinguished the candle and the chalice and shared a Universalist blessing.

### **Adjournment**

Moderator Lea Pearson adjourned the meeting at 1:15pm.

*Minutes submitted by Holly Cashman, Parish Clerk*

## **Minutes for FRS Special Congregational Meeting, September 27, 2020**

Via Zoom

Present: Justin Murphy-Mancini, Director of Church Music, acting as Zoom host and tech engineer for the meeting; Lea Pearson, Moderator of the meeting; 130 participants

### **Call to Order**

Justin Murphy-Mancini announced that there were no new people joining the meeting and turned things over to Lea Pearson. Lea announced that we have a quorum and called the meeting to order at 11:51 am.

Lea Pearson turned the floor over to Rev. Rebecca Bryan for the chalice lighting. She led the participants in the reading of the chalice lighting and the Affirmation of Faith. She turned the floor back over to Lea Pearson.

Lea Pearson introduced the warrants (overview), presented the Zoom etiquette for the meeting, and explained the voting process. Each article was then presented and voted on in turn. Following is a summary of the action on each.

### **Article 1: To act upon the recommendation of the Parish Board for the election of an officer to fill a vacant position.**

The following motion was made by Micah Donohue and seconded by Holly Cashman:

**Motion:** *“I move that the members of the First Religious Society elect Sadie Fountain to the vacant position on the Parish Board for a one-year term as Youth Board Member.*

**Discussion:** Parish Board Chair Rebecca Brodish provided the background on the first article. Rebecca explained that due to a board member needing to step down because of a job change and a move, this provided us with the perfect opportunity to invite a youth board member, which had been something under consideration for a long time.

Questions from Julie Menin, Susan Ricker, Leslie Barrett, Art Henshaw.

**Vote:** The motion passed.

## **Article 2: To act upon the recommendation of the Parish Board for Values, Mission & Ends.**

The following motion was made by Judy Fayre and seconded by Renée Wolf-Foster:

**Motion:** *“I move that the members of the First Religious Society endorse the Values, Mission & Ends proposed by the Parish Board.”*

**Discussion:** Lea Pearson introduced Forrest Speck, Parish Board member and Values, Mission & Ends (VME) Core Group member, for the background on this article. Forrest explained that this is considered to be a process to be revisited every five years, and he gave an overview of the timeline of the VME process, including the decision to postpone the vote from the Annual Meeting in May. Forrest turned the floor over to Rev. Rebecca for some additional words to contextualize the VME process of “collective discernment,” emphasizing that these are just words, but we as a congregation will make them come to life. Parish Board Chair Rebecca Brodish described what will come next after the VME are approved by the congregation – developing two to five strategic priorities for each of the ends and metrics for measuring our progress, which will drive the work of the Parish Board for the next five years.

Rev. Rebecca read the five proposed Values, the four phrases of the Mission, and the seven Ends.

Lea asked Renée Wolf-Foster to share the names of the members of the VME Core Team.

Rev. Rebecca added that Vern Ellis helped with the design of the materials and Juliana Beauvais helped with the interpretation of the data.

Justin added links in the chat to the VME on the church website and to Rev. Rebecca’s Theological Interpretation of the Ends.

**Vote:** The motion passed.

## **Article 3: To act upon a request from the Director of Finance and Operations for approval of expenses of \$10,000 for steeple repair to be performed by American Steeple.**

The following motion was made by Tom Himmel and seconded by Michelle Kimball:

**Motion:** *I move that the request from the Director of Finance and Operations for \$10,000 in expenses for steeple repair to be performed by American Steeple be approved.*

**Discussion:** Kristen Fehlhaber provided an overview of the financial request. The funds will come from the Bailey Fund for the upkeep of the building. Questions from Betsy Hazen, Chuck Kennedy, Ray Wilson, Jessica Brown, Leslie Lawrence, Minnie Flanagan, Art Henshaw, and “Melissa’s iPhone.”

**Vote:** The motion passed.

**Article 4: To act upon any other business that may legally come before the Parish.**

Lea Pearson explained that there is some concern about whether this fourth article is or is not a legitimate article, so she did not ask for any new business.

**Closing Words**

Lea Pearson invited Rebecca Brodish and Rev. Rebecca for closing words. Rebecca Brodish thanked everyone for their attendance at the meeting. Rev. Rebecca gave closing words of community connection and called on the congregation to be good stewards of each other and our beloved community. She led the participants in a reading of the Unison Benediction and extinguished the chalice.

**Motion to Adjourn**

Rebecca Brodish moved that we adjourn.

The motion was seconded by Minnie Flanagan.

The motion was passed.

**Adjournment**

Lea Pearson adjourned the meeting at 12:49pm.

*Minutes submitted by Holly Cashman, Parish Clerk*

# REPORTS FROM THE PARISH BOARD, STANDING COMMITTEES, AND TRUSTEES OF THE ENDOWMENT

## Parish Board

What a year this has been for FRS and for each and every one of us! The spring I see outside my window – trees budding, birds twittering on the feeder, lengthening days – echoes the lightening I feel as we start to emerge after this long and strange year! FRS has been a beacon of hope, a way to be together without being physically together, for so many of us. I am so grateful for this community and for the work all of you are doing! I am also grateful for the work of our Parish Board! I want to thank you all: Maureen Adams, Juliana Beauvais, Rev. Rebecca Bryan, Holly Cashman, Micah Donahue, Vern Ellis, Judy Fayre, Sadie Fountain, Art Henshaw, Tom Himmel, Michelle Kimball, Rich Johnson, Forrest Speck, and Renée Wolf Foster.

## Values, Mission & Ends

At the Special Congregational Meeting on September 27, 2020, the First Religious Society voted to endorse the Values, Mission & Ends proposed by the Parish Board. Earlier in the month, the Parish Board, members of the VME Team and Pastoral Care Associates reached out with phone calls to members with a reminder about the upcoming Special Meeting, to ask after their well-being, and to ask the following question: “What difference would you like to see FRS make in the lives of its members, community, and friends?” Rev. Rebecca shared her Theological Interpretation of the Ends and delivered a sermon on September 20<sup>th</sup> entitled “Love Is the Doctrine of this Church,” in which she shared the Values, Mission & Ends with the congregation. The enormous amount of work performed by FRS parishioners and the Parish Board over the year and a half leading up to the vote resulted in the Values, Mission & Ends below:

### VALUES

*are those timeless qualities we seek to embody in all we do.*

- Authentic Connection
- Courageous Action
- Love
- Spirituality
- Wonder

### MISSION

*looks at what is our transcendent purpose and whose lives will we change.*

- Come as you are
- Journey together in love
- Act with courage
- Transform our world

### ENDS

*are intended to be more specific, answering the question: what measurable difference will we make and for whom?*

Together we, across the lifespan:

- Connect to spirituality, joy, and wonder in diverse worship and music experiences that develop lives of courage, meaning, hope, and love.
- Articulate our individual and congregational Unitarian Universalist identity, deepen our understanding of it, teach it to our children, and live it in the world.
- Foster an authentic intergenerational church community.
- Welcome people in all their diversity and create belonging for one another.
- Support one another in the joys, sorrows, and transitions of our life journeys.
- Work in partnership, as individuals and as a congregation, to advance justice and put courageous love in service to our community and our world.
- Honor our FRS and UU heritage as we journey together.

We are so grateful for the work of the original VME Core Team: Tom Himmel, Renée Wolf-Foster, and Forrest Speck! And many thanks to the Pastoral Care Associates and Board members who reached out to members with phone calls this fall!

The work on the Values, Mission & Ends did not end with the vote in September! In October, the Parish Board held a virtual retreat, facilitated by Laura Park, to begin work on the strategic priorities for each of the ends and to discuss how the Board will measure progress on these goals. A new Core Team was appointed and charged with working with the staff and congregation to develop two to five strategic priorities for each of the Ends. We are so grateful for the work of this year's Core Team: Tina Benik, John Mercer, Forrest Speck, and Renée Wolf-Foster!

### **Care for Staff, Resources and Ministries**

During the past year, FRS has seen transition and transformation in our staff. In the fall, we hired Cynthia Walsh as Director of Congregational and Community Outreach. This is an expanded role from the previous manager-level position. We are delighted to welcome Cynthia to FRS! She brings her experience as a community organizer, specializing in membership programs and leadership development. We also added a new Multimedia Specialist position, to answer the increased need to connect with the congregation virtually and bring experience with the technical aspects, sound, and video editing. Andrew Bakhit joined FRS in this role earlier this spring, bringing previous church experience. Join me in a warm welcome for Andrew! We are so grateful to Tom Himmel, who served as Interim Director of Finance and Operations after the departure of Kristen Fehlhaber earlier this year. Tom provided grace under pressure, a steady and calming influence, and an amazing sense of humor! I cannot thank Tom enough for his work this year! Finally, we're thrilled to welcome Pam Sharrio as our new Business Administrator. Pam brings nonprofit finance, human resources, and operations experience to the role. Welcome, Pam!

This year also saw the nomination and election to the Parish Board of the first Youth Board Member, Sadie Fountain. We were delighted to work with Sadie this year, and we look forward to working with next year's Youth Board Member!

## **Stewardship**

In the fall, the Parish Board voted to approve bringing on Mark Ewart to provide outside consulting assistance focused on stewardship. Mark led a stewardship presentation for the Parish Board at our December meeting. The Board continues to believe that separating the stewardship efforts of FRS from the Finance Committee is the right path forward. Now that we have a new Business Administrator and a Stewardship Chair in place for next year, Mark Ewart will continue the work he began this year to develop a structure and a plan for the future of stewardship at FRS.

## **Final Thoughts**

As we head into the end of the church year, I am filled with hope for what next year will bring! I also look back in wonder at what we have accomplished this year. Thanks to all of you who have worked together to make it possible.

Respectfully submitted on behalf of the Parish Board,

Rebecca Brodish, Chair

## Theological Interpretations of the Ends

By Reverend Rebecca M. Bryan

Ours is a *covenantal faith*, in which we make promises to one another that seek to uphold the principles of Unitarian Universalism and make manifest the ideals to which we aspire. We are governed by congregational polity, taken from the *Cambridge Platform (1648)*, which was based upon the model of the early Christian church. Our congregation is self-governed, guided by our group consciousness and the use of the democratic process in all our affairs. We believe that our collective action, discernment, and capacity for goodness are stronger than what any of us have as individuals.

*Love is the only doctrine of our church.* We come together as a congregation, celebrating and honoring the diversity of our members and friends, and drawing upon the gifts of our diversity and theological plurality. We know that we do not do this alone, for there is an abiding spirit within and among us, which we call love, which guides us in our journey together.

Our *Affirmation of Faith* states that:

Love is the doctrine of this church,  
The quest of truth is its sacrament,  
And service is its prayer.  
To dwell together in peace,  
To seek knowledge in freedom,  
To serve humankind in fellowship,  
To the end that all souls shall grow into harmony with the Divine  
Thus do we covenant with each other and with God.

*Using this affirmation as our bedrock, our values as our light, and our mission as our focus, we collectively agree to work toward the following ends. These ends are akin to the pillars of our faith community. Taken together, they create a scaffolding for our work, guiding our gifts and resources of money, people, and time.*

The ends are interdependent, working in unison to further our mission and sustain our values. They do not work alone, nor do they compete for our resources or attention. We recognize that the prominence of each individual end will ebb and flow according to the rhythm of the church year, the lives of our members and friends, and the circumstances of the world around us. We understand these ends to be organic, growing and evolving as we do, collectively and individually. We promise to be open to that evolution and to reconsider the expression of these ends on a regular basis, modifying their expression and focus as needed.

We promise to hold ourselves and each other accountable to the pursuit of these ends, assuming good intention in our collective work, while understanding mistakes will be made and can be corrected without shame. We promise to learn together, work together and love together for the good of each person, the whole congregation, and the wider community of which we are a part. We are accountable to our consciences, God as we understand God, one another, our neighbors, the larger Unitarian Universalist tradition, and our Association of congregations.

## ENDS

For purpose of illustration, each end is connected to one of the *seven Unitarian Universalist principles*. In reality, every end advances most, if not all, seven principles. Each end is also illustrated by a quote from a Unitarian, Universalist, or Unitarian Universalist. There is an abundance to choose from; these are just a few.

*Together we, across the lifespan:*

### **1. Connect to spirituality, joy, and wonder in diverse worship and music experiences that develop lives of courage, meaning, hope, and love.**

Advances the 4th Principle: A free and responsible search for truth and meaning.

*There is religion in everything around us, a calm and holy religion in the unbreathing things in Nature. It is a meek and blessed influence, stealing in, as it were, unaware upon the heart. It is that which uplifts the spirit within us ... and which opens to our imagination a world of spiritual beauty and holiness. – John Ruskin*

*Worship and music are the glowing center of our congregation, from which we draw on the indwelling spirit of love, renewal, and wisdom. We are open to the spirit of mercy, love, and compassion that moves in and among us as we worship. This experience of communal worship sets church apart from other things in our life. It is also where many people are introduced to our faith. We gratefully welcome everyone who comes to worship with us, whether in bow ties or yoga pants. We embrace the truth that we are changed for the better by all who gather and are grateful for the opportunity.*

Each time we gather for worship and music is a sacred occasion, and thereby an opportunity for transformation. Worship and music seek to open our hearts to joy and wonder, illuminate our minds with truth and intellectual rigor, and embolden our will to work for justice in this world. Therefore, we treat it with the sanctity it deserves.

Worship and music, among other things, inform our actions, broaden our perceptions, and deepen our intellect, faith, and interior life. It is something we return to, again and again, as fellow participants in our faith community.

Worship and music offer respite, renewal, and comfort in times of weariness or need. We participate in worship as well through the warm embrace of community and friends, offering understanding, compassion, and strength to each other. We recognize all who gather as equal in worth and dignity with gifts to share. We learn and grow from the theological, cultural, and racial diversity of our members, friends, and guests, and integrate our learnings into our lives. Worshipping together makes us stronger, more resilient, and more compassionate.

We draw on the sacred texts and writings of world religions, poetry, and world literature as sources of inspiration and models of living to further our collective and individual spiritual journeys. We have a *covenant of shared ministry* built upon the *priesthood of all believers*. We honor and respect the spiritual leadership, wisdom, and experience of our settled minister and other ordained clergy. We also bear witness to, honor, and respect the same in all our members and friends, knowing that we are all ministers to each other.



Our worship creates space to celebrate and make sacred the *life passages of our members* including child dedications, marriages, new member ceremonies, celebrations of life, and other passages and commitments. Children and youth are a vital part of our worship and music. Their participation in it makes it richer for all of us and helps instill in them the traditions of our faith and the power, purpose, and gift of worship in their individual lives.

**2. Articulate our individual and congregational Unitarian Universalist identity, deepen our understanding of it, teach it to our children, and live it in the world.**

Advances the 3rd Principle: Acceptance of one another and encouragement to spiritual growth in our congregations.

*While faith has aspects that are internal and personal, it is best supported and sustained in a community with shared symbols, stories, traditions and values. Unitarian Universalist faith development emphasizes each person's religious journey, each person's lifelong process of bringing head, heart and hands to seeking and knowing ultimate meaning as part of beloved religious community. – Rev. Dr. Thandeka*

*Unitarian Universalism is a living faith, meaning that while it is steadfast in its adherence to our Unitarian Universalist principles, it is ever evolving in its understanding of how best to live into those principles. Revelation, or understanding of life and spirituality, is not sealed. By committing to a lifetime of learning and spiritual devotion, we make space for connection to the reality of this ongoing process of evolution, revolution and revelation.*

Ours is a faith based on promises and personal responsibility. Promise making, or covenanting, is a critical part of our faith and thus our spirituality. We promise to support one another in our faith journeys, offering opportunities to learn, share, and reflect together. We hold this commitment to be critical to the wellbeing and ongoing spiritual maturation of our congregation and our members and friends.

We promise to make our faith real and relevant by supporting one another in the sacred struggle to articulate our personal beliefs and how to apply them in our lives. We understand faith formation and spiritual exploration to be a *lifelong, ever evolving journey*, unique to each individual, made stronger by learning together. We experience our faith by what we learn and by how we act in our lives. We commit to ongoing learning, action, and reflection, understanding the need for and value of each. This learning is a priority of the congregation and built into all that we do.

Though our minister, supported by the professional staff, is our spiritual leader, we are all students, and we are all teachers. We learn and grow together, and offer this same opportunity to all ages, and everyone in the congregation, at all stages of life. We share these learning opportunities with the wider community as appropriate and invite them to help us learn as well. Learning is a reflection of the role of *reason and intellectualism* in our faith formation, as well as a *spiritual discipline*.

**3. Foster an authentic intergenerational church community.**

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

*Alone, our vision is too limited to see all that must be seen and our strength too limited to do all that must be done. Together, there is more hope, and more help for us all on this small blue planet. – Rev. Bill Sinkford*

*All of us need all of us to make it. – Rev. Theresa Soto*

As a faith built on *relationship and connection*, we honor the gifts of all of our members and friends and recognize them as gifts of the spirit made manifest in each individual. We intentionally create opportunities that foster and strengthen the gift of our *intergenerational community of faith*. All people, of all ages, contribute to making our congregation what it is. All people are equally important. The value of a person is not determined by age, education, or prominence in society. The beauty of relationships across the ages is exquisite and offers gifts to everyone. Our intergenerational commitment crosses all areas of church life including worship, lifelong faith formation and spiritual exploration, justice work, fellowship, and care for one another.

We recognize the gifts every age brings to our church community and the need and benefit to everyone of being in relationship with people of all ages. We recognize the decreasing presence of intergenerational communities in the larger society as families change in how and where they live, often not living close to one another, and that other organizations also struggle to offer such opportunity. The church is a natural place to develop *lifelong relationships across the ages*, where all people benefit. We integrate such a perspective into our programming and church culture, experimenting with new ways to bring people across the lifespan together and into relationship. We do this with *mutual respect for all*, alert to the tendency for ageism and other biases. We share privilege and power appropriately and generously across the ages in our community. We learn from our mistakes and from each other and continue to grow and deepen our fellowship and lives as a result of our commitment to intergenerational community.

We keep all members and friends safe and uphold our safety covenants. We are all accountable for *healthy boundaries* and behavior and promise to practice and uphold these commitments. We keep each other safe by supporting those who are being discriminated against and having zero tolerance for unsafe behavior. Because our faith is real and relevant, we understand this behavioral pledge to be a spiritual practice of caring for one another and living in integrity. We believe that how we treat others is how we treat ourselves, as reflected in the 7<sup>th</sup> principle of our faith, our covenant to uphold and protect the *interconnected web of life, of which we are a part*.

#### **4. Welcome people in all their diversity and create belonging for one another.**

Advances the 1st Principle: The inherent worth and dignity of every person.

*The religious way is the deep way, the way that sees what physical eyes alone fail to see, the intangibles of the heart of every phenomenon. The religious way is the way that touches universal relationships; that goes high, wide and deep, that expands the feelings of kinship. –Sophia Lyons*

The ontological struggle for all humans is to live in the exquisite and sacred balance of *belonging to oneself and belonging to others*, in our case, the congregation. Navigating individuation of self, while maintaining healthy and real connectedness as a part of the whole, is deeply spiritual work. Humans realize this or work toward its end through experience and being in relationship. It pains us to know so many people and groups of people do not have a spiritual or religious home where they can belong and be open about who they truly are. We strive to make ours *a faith where all people can*

*belong*, if they so choose, and be fully and openly who they are. We believe that true belonging creates the conditions which support us in our journey of self-understanding and differentiation. It is a need and inherent right for all people to know they belong, and we open our congregation to all who choose to belong with us.

We understand and respect that *belonging carries with it responsibilities as well as gifts*, namely to extend that belonging to others and to care for each other. The teachings of world religions, religious naturalism, earth-based religions, secularism, humanism, and the lives of great people, are sources of our faith. As such we strive to live into what they teach about our responsibility to *welcome the stranger* into our midst and create a sanctuary for their hearts, minds, and bodies. We honor the divinity and equality of all people and seek to reflect that to one another in all we do. We make our welcoming known as broadly possible in the community and to those who may be seeking a faith community like ours. In so doing we live into the truth that no one need ever be alone.

We welcome diversity, and we change because of the diversity of our members, friends, and guests. We adapt our practices and culture as we learn of our biases and tendencies. We hold ourselves accountable to regular review of our practices, policies, and approaches to all aspects of church life and to changing such things that are oppressive, unwelcoming, or biased. We hold ourselves accountable to lifelong learning about radical welcoming, LGBTQ+, anti-racism, anti-ageism, anti-ableism. We offer diverse ways for people to experience worship and church life that reflect the myriad ways people experience belonging.

## **5. Support one another in the joys, sorrows, and transitions of our life journeys.**

Advances the 2nd Principle: Justice, equity and compassion in human relations.

*...sometimes, if you ask a stranger what they need, you might just make a friend. – Rev. Sunshine Jeremiah Wolfe*

Ours is a relational theology. We thrive on genuine connection to our true selves, other people, the Earth and its creatures, and the holy, experienced by each of us in our own ways. We realize the theological and eschatological vision of a world transformed by love, made manifest by the actions of those living. We orientate toward being responsible for creating “heaven on earth,” or safe havens, for our beloved members and friends.

It is both a privilege and a gift to support those around us, and we attest to the transcendence and presence of mystery that works between us through such care. We promise to show up for one another offering the gifts of our presence, care, and love in times of difficulty, uncertainty, and joy. We nurture and sustain authentic relationships with each other, in order to know one another honestly and free of pretense. These promises and actions prepare the soil of authentic connection, fertilized by acts of care and harvested in times of need.

We celebrate the spiritual truth that as humans, we are all sinners and saints. We all fall short of perfection, which we believe is an unattainable illusion, not meant for humans. We laugh together, cry together, and grow together, encouraging the inherent gifts of every person to flourish. We support the work and well-being of our congregation by joyfully sharing our gifts, talents, and treasures as we are able. In so giving, we strengthen our sense of meaning, our connection to ourselves and the congregation. Joy and play are an important expression of wholehearted living, and

nurture renewal in our congregation. So too, learning and growing intellectually are a part of a whole person. We make room and create opportunities for all of that, and more.

We honor the gift of the relationships we create in our congregation through upholding confidentiality, speaking directly to people rather than about them, and keeping our church relationships free of external matters and business. We honor our relationships by keeping them free of profit or business benefit. We delight in creating relationships with many different people, always making space for the newcomers and resisting temptation for exclusivity or fixed circles of care.

## **6. Work in partnership, as individuals and as a congregation, to advance justice and put courageous love in service to our community and our world.**

Advances the 6th Principle: The goal of world community with peace, liberty, and justice for all.

*To commit to creating a prophetic congregation today is to grapple with what it means to take responsibility for cocreating the holy right here on earth. – Rev. Meg Riley*

We believe in the need for *action and contemplation* in our work for justice. We turn to our spiritual practices, connection with each other, and the transcendent to rekindle our energies and guide our actions. We believe that *faith without works is dead*, and thus we strengthen our faith through acts of service.

The sources from which we draw our religious grounding teach the need for helping our siblings on this earth. Our Universalist heritage teaches that no person is free, or liberated, until all people are liberated. In Buddhism the bodhisattva works to alleviate the suffering of others, delaying their own entrance into nirvana. The Humanist Manifesto III affirms that doing good for society increases the happiness of an individual. The Qur'an teaches in Islam that when you save one person's life, you save humankind. Jews have an obligation to perform tzedakah, or charitable acts. Rooms of recovery assert that an individual's recovery from addiction is predicated on helping others who suffer with the same affliction.

For service work to be true and lasting, it needs to be done *in relationship* with those affected by the injustice. We believe in the power of *collaboration and partnership* and recognize the weakness inherent in solo approaches to working for justice, whether as an individual or as a congregation.

The needs of the world are many, and we realize that we cannot respond to them all. Therefore we focus on issues of justice that are present in our local communities, or to which we have been invited by those with whom we are in relationship; and that best use of the passions of our members align with our Unitarian Universalist principles and do no harm. At the present time this includes being a Level II Sanctuary congregation, maintaining membership in organizations working for gun control, supporting the work of local organizations, and partnering in efforts for anti-racism, climate justice, and affordable housing. We regularly review the priorities of our justice work and ensure that we are supporting them with integrity and the support of our individual and collective learning, prophetic witness, ministerial and staff time, along with lay leadership, and budgetary resources.

## **7. Honor our FRS and UU heritage as we journey together.**

Advances the 5th Principle: The right of conscience and the use of the democratic process within our congregations and in society at large.

*“What is a course of history, or philosophy, or poetry, no matter how well selected, or the best society, or the most admirable routine of life, compared with the discipline of looking always at what is to be seen?” – Henry David Thoreau*

Ours is a history rich in *tradition and legacy*. Unitarians have been torchbearers for the individual’s responsibility to personal conscience, and to a personal search for truth and meaning, unencumbered by dogma or creeds, since the 16<sup>th</sup> century. Our Unitarian forebearers insisted upon the integration of reason, intellectual rigor, and faith. Our *Universalist* ancestors saw the light of God in every person. Theirs was a faith that turned away from predestination and a damning hell, dominant in the Protestantism of their day. Universalism appealed to the masses and opened new possibilities for universal salvation and redemption for all.

We honor, respect, and draw upon our Unitarian, Universalist, and Unitarian Universalist ancestors and predecessors. It is our goal to know these people as whole people, whose lives mattered at the time they lived, and continue to matter today.

The pillars of our ancestors’ faith are integrated into our spiritual and religious DNA. Today we move the voices and lives of those who are traditionally on the margins into the center of our circle. We work to protect what our ancestors called the spark of the divine in all people, which we refer to today as the inherent worth and dignity of all people.

Our church has been a *beacon of liberal religion* in Newburyport and the surrounding area for 295 years. Its roots are in congregationalism, Unitarianism, and, then and now, Unitarian Universalism. We honor the history of our congregation and the Unitarian Universalist faith by learning from their success and misgivings. The next five years are a wonderful opportunity to prepare for the 300<sup>th</sup> *anniversary* of the FRS, through a deep and comprehensive study of the congregation, its people, and the times in which it operated. We use the tercentenary as a time of public celebration and reconciliation. So too is it an opportunity for our congregation, and our members and friends, to deepen their personal and collective faith journeys. This important work creates a bedrock from which we learn, grow, and move.

We believe that the *study of history* is in itself a spiritual practice, when done with an open mind and a commitment to *uphold the victories of the past and set right whatever mistakes we can*. This includes owning our role in racism, sexism, and acts of oppression and omission. By this practice, we hope to attain a degree of *humility* that will put us on equal footing with all people.

## Annual Giving Campaign

The Annual Giving Campaign has a lot of moving parts, including recruiting leaders, creating campaign materials, organizing Giving Sundays, training stewards, making all the calls, sending follow-up emails, tracking progress, and communicating effectively with the congregation. This year, we were fortunate to have Mackenzie Rafeldt and Jill Porter, a mother-daughter team, lead the Annual Campaign. They assembled six “team captains” whom we would like to recognize and thank for their hard work: Juliana Beauvais, Lark Madden, John Mercer, Brent Mitchell, Susan Ricker, and Forrest Speck. Mackenzie, Jill, and the team captains coordinated with the stewards and organized the dollar-for-dollar “Meet the Match” program. A special thanks to Lark Madden and John Mercer for recruiting participants for the match program, to the group of congregants who donated \$18,000 to the match pool, and to all those who submitted new, ongoing, and increased pledges to put FRS on solid footing for the next church year. We also thank Andrea Healy for designing our beautiful campaign brochure!

As of this writing, the Annual Campaign has resulted in \$517,500 in pledges from 287 households. We anticipate meeting our goal of \$521,090 by the time of the Annual Meeting. Heading into FY 2022, FRS has a 15% higher dollar-value pledge commitment compared to FY 2021 from a similar number of households. These are phenomenal results given the conditions imposed by the COVID-19 pandemic.

None of this would be possible without the dedication of FRS staff. Office administrator Diane Carroll managed the campaign packet mailing, processed all the incoming pledges, and communicated regular updates to the annual campaign team. Tom Himmel, in his role as Interim Director of Finance and Operations, provided guidance and support on topics such as continuous pledges and accounting for donations. Pam Sharrio started in her role as Business Administrator mid-campaign and jumped right in to assist with ongoing efforts.

Each year when FRS conducts its campaign, volunteer stewards reach out to the congregation to connect and encourage pledges. In addition to the six team captains and two campaign leaders listed above, this year 24 congregants served as stewards. They are: Jeff Bard, Tina Benik, Rebecca Brodish, Joseph Brouillet, Holly Cashman, Eileen Costello, Stephen J. Costello, Nancy Crochiere, Kathy Desilets, Vernon Ellis, Michael Fosburg, Barbara Garnis, John Gibson, Cecilia Healey, Jay Iannini, Annalee Johnson, Lisa Johnson, Kim Kenly, Patrice Litwin, Merryl Maleska Wilbur, Hugh Martinez, Bettina Turner, Anne Verret-Speck, and Ray Wilson. To each of these folks we owe a debt of gratitude for their willingness to take time to support FRS in this important role year after year.

Respectfully submitted,

Juliana Beauvais

## **Endowment Treasurer Report**

Last year, the Parish approved the separation of the Treasurer's position into two positions, whereby the Finance Treasurer focuses on all financial matters of the church and the Endowment Treasurer focuses on the endowment funds of the church. The two Treasurers work together when necessary, especially to approve checks over a certain amount and coordinate as a check and balance for certain calculations.

The Endowment Treasurer keeps accurate balances, on a monthly basis, of the eight unique endowment funds – Parish, Building, Stover, Fowler, Bailey, Alliance, Swasey Orphan, and Swasey Income. The Endowment Treasurer also distributes income from certain endowments on a quarterly basis in accordance with the agreed upon distribution rate set by the Trustees, which for the 2021 FY was 4.75%. The Endowment Treasurer also records any new gifts to the endowment.

The Endowment Treasurer is a regular participant in Trustee meetings. Please see the Trustees' Report for a more comprehensive reporting of the endowment.

Respectfully submitted,

Kim Kenly

## **Finance Committee**

The final results of FY20 were better than anticipated given the pandemic shutdown last March. Net Operating Cash Flow was positive by \$7,354, which was a welcome surprise. Incomes of \$619,825 were \$23,778 less than budgeted; yet Expenses of \$657,044 were also less than budgeted by \$25,841, with a positive Operating Cash Flow of \$44,583 - \$5,187 more than budgeted.

When the annual Dinner Anywhere raffle became impractical in the pandemic, a strong response of \$25,723 from members and friends for its substitute, the FRS Recovery Fund Raiser, largely made up most of the lost ground. In other areas, pledge income of \$420,831 was \$12,759 less than budget, while building rental and other services lagged \$10,306 below budget in the pandemic.

Salaries and Related Expenses remained well within budget of \$500,000 for the year, ending \$24,583 less than budget mostly related to brief periods of position vacancies. Changing needs in the pandemic were met creatively by redeployments of existing staff and considerable effort at no significant additional expense. Non-personnel expenses were \$5,742 over budget, largely in technology costs.

Operating Cash Flows were normal, though an accrual of \$7,000 for the Capital Reserve Fund was recorded as a Facilities Expense and was therefore not reported under Cash Flows as budgeted.

<b>Fiscal Year 2020 June 30 Results</b>		<b>FY2020</b>	<b>FY2020</b>
		<b>Budget</b>	<b>Actual</b>
<b>Ordinary Income/Expense</b>			
Income			
Total 4100 · Contributions		483,590	504,879
Total 4135 · Steeple Rentals		95,713	93,085
Total 4200 · Fees for Services		20,500	10,194
Total 4300 · Fundraising Income		41,800	7,319
Total 4400 · Income from Committees		1,000	796
Total 4500 · Miscellaneous Income		1,000	3,552
<b>Total Income</b>		<b>643,603</b>	<b>619,825</b>
Expense			
Total 7200 · Salaries & related expenses		499,533	474,950
Total 7500 · Outside Services		16,621	16,149
Total 8100 · Supplies, Comm & Equipme		31,104	36,815
Total 8200 · Facilities Expenses		59,520	62,854
Total 8300 · Travel & meetings expenses		0	0
Total 8500 · Misc expenses		76,107	66,276
<b>Total Expense</b>		<b>682,885</b>	<b>657,044</b>
<b>Net Ordinary Income</b>		<b>-39,281</b>	<b>-37,219</b>
Operating Cash Flows			
Transfers from Endowment		52,996	52,996
Capital Reserve Contribution		-7,000	0
Mortgage Principal Payments		-6,600	-8,413
<b>Total Operating Cash Flows</b>		<b>39,396</b>	<b>44,583</b>
<b>Net Operating Cash Flow</b>		<b>115</b>	<b>7,364</b>

### FRS Assets as of June 30, 2020

In FY 2021, the DFO and Finance Committee reviewed and reconciled Meeting House Project results, Special Campaign results to date, and the FRS Balance Sheet as of June 30, 2020. An update on the Special Campaign is included in Tom Himmel's report as Interim Director of Finance and Operations.

### Balance Sheet, June 2020

The FRS balance sheet, June 30, 2020, was reconciled with supporting documentation by the Director of Finance and Operations, reviewed with the Finance Committee and the Auditor, and is summarized here.

### Net Current Assets, June 2020

<b>Assets</b>		<b>Liabilities</b>	
<b>Current Assets</b>		<b>Current Liabilities</b>	
Payroll Protection Proceeds	72,000	PPP Loan Liability	72,000
Capital Campaign Proceeds	103,761	Pledge Contributions for Next FY	51,733
Temporarily Restricted Endowment	93,106	Parish Hall Kitchen Liability	38,535
All Other	87,272	All Other	31,962
<b>Total Current Assets</b>	<b>356,139</b>	<b>Total Current Liabilities</b>	<b>194,230</b>
		<b>Net Current Assets</b>	<b>161,909</b>
		(Current Assets – Current Liabilities)	



When FRS applied for and received a PPP loan of \$72,000 in FY 2020, it was recorded as an asset in cash and a loan in current liabilities. When FRS applied for and was granted forgiveness for the loan in FY 2021, the forgiveness was reported as \$72,000 in grant income, reducing the loan liability to zero.

Capital Campaign proceeds will be used to fulfill campaign goals once final campaign results are known and their use is approved by the Parish Board.

Income distributions from the restricted Swasey Endowment funds are temporarily restricted until their final distribution according to Swasey fund purposes.

### Long Term Assets and Liabilities, June 30, 2020

<b>Assets</b>		<b>Liabilities</b>	
<b>Fixed Assets</b>		<b>Long Term Liabilities and Equity</b>	
Total Fixed Assets (Buildings)	3,083,424	Mortgage + AT&T Deposit	135,634
<b>Other Assets</b>		<b>Equity</b>	
Endowment Receivable	100,000	(Equity accounts not reconciled)	
Antiques and Historical Objects	165,950		
Endowment and Legacy Funds	1,604,645		
Total Other Assets	1,870,595	Total Equity	4,980,294
<b>Total Assets</b>	<b>5,310,159</b>	<b>Total Liabilities and Equity</b>	<b>5,310,159</b>

For the first time, the year-end balance sheet shows no balance for the Eastern Bank working capital loan, now fully paid off from proceeds of the Special Campaign! With successful completion of the Special Campaign, we hope the balance sheet in FY 2022 can show a Futures Fund to support FRS transitions, and a zero balance for the mortgage. It bears repeating, lest we forget the saga of the steeple, how grateful the Finance Committee is for the stewardship support of our members in a time of need. We are almost there!

Still painfully aware of our income loss from Verizon, it was remarked to the FinCom how that loss is equivalent to losing a \$900,000 endowment fund and its distributions at 4% per year. This is a vivid reminder for the stewardship value of locating and maintaining good contacts within AT&T, whose rental income from the steeple is equivalent to 4% per year distributions from a \$1,500,000 endowment. Clearly some of our high value “assets” are intangibles not monetized on the balance sheet.

### Results for FY 2021 and Budget for FY 2022

Work continues to estimate Operating Results for FY 2021 and to propose a Budget for FY 2022, to be presented at the May 12 Parish Board meeting. Unfortunately, details are not yet ready to be included in this report.

Painfully, we know this much for certain: The loss of \$36,500 in income from the Verizon lease is permanent and will continue as a financial constraint until income replacements are developed.

The FRS fiscal environment for FY 2021 and FY 2022 presents a challenging mix of rising hopes and goals, growing needs to meet those hopes and goals, and disruptions of formerly steady incomes like the Verizon lease.

Fortunately, FRS donors have responded to the situation with a “Boost Fund” for encouragement of FY 2022 pledges and increases, which we are hopeful will meet the canvass budget goal. We also have some backup from the PPP loan forgiveness of \$72,000, which we hope will not only offer economic protection in FY 2022 for the planned level of staffing and other operating expenses, but last long enough for protection of future years until Verizon income replacements are developed.

In the end, we believe the Parish Board will bring a “balanced budget” recommendation to Annual Meeting.

### **Capital Projects**

An energy conservation project for the Meeting House and Parish Hall initiated by Climate Action Project was successfully completed in 2020. Begun in 2018, planned with Mass Save, and designed by Rise Engineering, \$37,000 of weatherization and insulation improvements were installed at FRS at a net cost of \$1,333 to FRS, thanks to substantial financial incentives from the utility companies. The project predicts \$3,000 of energy will be saved yearly. Thank you, Climate Action Project!

The Bailey Fund provided \$8,600 in January for steeple repairs and will likely be asked at Annual Meeting for approximately \$10,000-\$12,000 for furnace repairs and potentially some additional facilities costs in connection with FRS reopening in FY 2022.

### **Recognitions**

This year we were surprised and saddened by the unexpected departure of Kristen Fehlhaber, Director of Finance and Operations. We are grateful for her contributions to the financial and human affairs of FRS these last few years and wish her the best.

Now, a shout-out for our members. In addition to their service on the Finance Committee, Tom Himmel’s many capabilities and good nature have been of full display this year, graciously filling many roles - too many to name - following Kristen’s departure; Lark Madden, Susan Ricker, Kim Kenly, and Mackenzie Rafeldt have all played key roles in Stewardship, Fundraising, Trusteeship, and Annual and Special Campaigns. As internal Auditor, Joe Brouillet assessed many of our financial systems according to UUA best practices; Art Henshaw worked with Kristen and Joe on the balance sheet, steeple project, and capital campaign reconciliations, and very effectively covered the role of Chair while Tom was otherwise engaged; Treasurer Rich Johnson worked regularly with our financial staff on accounting and banking activities, and played a key role in our PPP applications; and finally, Rev. Rebecca Bryan brought an unfailingly positive and spiritual outlook to our shared work at each meeting. Thank you, all!

Respectfully submitted on behalf of the Finance Committee,

Art Henshaw and Tom Himmel

## **Finance Treasurer Report**

The primary function of the Finance Treasurer continues to be the review of expenditures and disbursements and the signing of checks prepared by the Director of Finance and Operations (now Business Administrator). As needed, the Finance Treasurer has some bank contact for loans/credit (e.g., PPP SBA loans), and for various inter-account transfers with Newburyport Bank to allocate gifts between funds and to direct the fund transfer to support our sister church in Transylvania.

The Finance Treasurer is on the Parish Board which meets monthly and for special review meetings, such as Mission Vision development and budget planning. The Finance Treasurer is also on the Finance Committee which reviews and presents the budget to the Parish Board and reviews operating results regularly. The Finance Treasurer produced a report in October for Community Human Services to reconcile the income and balance sheet entries.

The creation of a separate position of Endowment Treasurer has been quite effective and allows for mutual back-up between the two treasurer roles.

Respectfully submitted,

Rich Johnson

## **Governance Committee**

The Governance Committee (GC) is responsible for ongoing review and recommendations to enhance excellence in governance and congregational leadership. It does this by overseeing the nominations process for the Parish Board and Officers, acting as a resource to the Parish Board on Parish Board effectiveness and leadership development, and supporting the Parish Board to implement policy-based governance through the development of Board policies.

The GC met monthly over the course of the 2020-21 church year, starting in October 2020. The GC consists of the following members: Maureen Adams (Chair), Micah Donahue (PB member), Renée Wolf-Foster (PB member) and Frances McLaughlin.

One of the major responsibilities of the GC is to manage the nominations process through which the congregation elects nominees (FRS members) to serve in lay leadership roles on the Parish Board, its standing committees, and as Moderator, Auditor, and Trustees of the Endowment according to FRS Bylaws. The GC, in partnership with FRS staff and the Parish Board, has made progress in increasing the degree to which FRS' lay leadership reflects the gender, sexual identity, and generational diversity of FRS, and there is more work to do!

Over the course of the nominations process, the GC continually discusses how FRS lay leadership can better reflect and benefit from the diversity that exists within the congregation. The GC specifically discussed ways to further engage youth in the leadership of FRS. The GC notes that FRS has a youth serving on the Worship Associate team and there was a youth representative on the Director of Church Music search committee. The GC recommended the first youth PB member in the 2020 nomination slate and will continue to promote youth engagement in all aspects of FRS.

In the coming church year, the GC will identify ways through the nominations process and other means to ensure that all members of FRS are aware of leadership opportunities at FRS and have the

opportunity to consider how their talents and perspectives might contribute to FRS's lay leadership. The GC plans to engage the Parish Board, specific groups like Up and Coming UUs and the Youth Group, as well as the congregation in an on-going conversation about the importance of diverse, inclusive lay leadership at FRS that welcomes contributions from all members, including youth and young adults, and identifies ways to prepare and support all lay leaders to be successful. The GC invites FRS members to share their ideas with the GC and welcomes volunteers to support the GC's efforts.

In our eighth year of operating as a standing committee the GC accomplished the following:

- Refined the Policy Process to assist in future Policy Development.
- Consulted Auditor to create Auditor Job Description.
- In partnership with FRS staff members and the Parish Board, expanded outreach to make the congregation aware of opportunities to serve in leadership roles resulting in a slate of nominees for church officer positions to be voted on by the membership at the Annual Meeting.
- Updated Bylaws with gender neutral language to be voted on by the Congregation at the Congregational Meeting in the 2020-2021 church year.
- Prepared for an orientation program for new board members to be held after the Annual Meeting.

Respectfully submitted,

Maureen Adams for the FRS Governance Committee

## **Human Resources Subcommittee**

### **HRS Membership**

The 2020-21 HRS members included: Holly Cashman, current Parish Board Member; Julie Forney Menin, Hugh Martinez, and Leslie Lawrence, former Parish Board members. Holly Cashman and Leslie Lawrence are co-chairs of the subcommittee. The Minister and the Business Administrator serve as *ex officio* members.

### **Subcommittee's Role and Structure**

The HR Subcommittee is appointed by the Parish Board annually. It acts in an advisory capacity to the Parish Board and FRS staff on issues related to FRS personnel and employee benefits. In this role, subcommittee members annually review the salary and benefit packages for staff positions to ensure that these meet the UUA's fair compensation guidelines. The HRS presents its recommendations on staff compensation for the next church year to the Parish Board in December/January to inform the development of the Canvass budget. From time to time, the Parish Board charges the HRS with additional projects.

### **The Work of the HRS in the 2020-21 Church Year**

#### **Staff Compensation**

The HRS developed and submitted detailed recommendations to the Board regarding staff compensation for the 2021-22 FRS church year. The HRS' salary recommendations were based on

several considerations: 1) the congregation's commitment to follow the UUA Fair Compensation Guidelines for all staff, with the goal that salaries are at the mid-point or greater of the UUA's salary range based on a congregation of our size in our geographic area, a Mid-Size Church in Geo area 4; 2) the commitment to maintain fair compensation standards by increasing salaries annually to reflect the rate of inflation over the previous 12 months, and 3) the financial challenges facing the church in the coming year.

**Background:** The UUA updated its salary compensation guidelines for the 2020-21 church year in January 2020. The midpoints for several staff positions were increased, some significantly. **The salaries of 4 four church positions fall below these new midpoints.** Last year (2019-20 church year), HRS recommended raising the salaries of these positions to the new UUA standards and providing all other staff with a cost-of-living increase of 2%. These recommendations were submitted to the Parish Board prior to the March 2020 declaration of the state of emergency due to the pandemic. Based on this new COVID reality, the Board decided to maintain all salaries at their current level, forgoing any compensation increases.

**Salary Recommendations for 2021-22 Church Year:** HRS urged the Parish Board to commit to take some steps to bring staff positions up to the UUA midpoints and provide a 3.2% cost of living increase to all other staff in order to avoid FRS falling further behind in meeting our congregation's commitment to fair compensation. (The 3.2% COLA reflects the previous year's missed COLA combined with the current year's COLA.) Given the fiscal impact of the nationwide shut down and the loss of one of FRS' cell tower leases, HRS presented the Parish Board with three alternative scenarios to accomplish this goal: 1) fully fund the salary increases needed to bring all positions up to midpoint and provide 3.2% COLA for all other staff; 2) increase the salaries of those below the midpoint by ½ of the difference with a commitment to raise them the rest of the way in the 2022-23 church year, and provide all other staff with a 3.2% COLA; or 3) provide all staff with a minimum 3.2% COLA.

### **Staff Hiring**

At the request of Rev. Rebecca and the Parish Board President, HRS members Hugh Martinez and Leslie Lawrence participated on the search committees filling the Multimedia Specialist and the Business Administrator positions, respectively.

### **Parish Board Charge to Review and Update Certain Employee Policies**

The Parish Board requested that the HRS review FRSUU employee policies related to separation of employment (voluntary and involuntary), employee work and vacation scheduling and the accrual/use of compensation time. HRS was asked to review current FRSUU policies in light of UUA recommendations and non-profit best practices and submit a report to the Board along with any recommended changes. HRS completed this review over the second half of the church year and is currently updating the employee manual to reflect Board-approved changes.

Respectfully submitted,

Leslie Lawrence and Holly Cashman, Co-chairs, Human Resources Subcommittee

## **Internal Audit Report**

The year was productive with five audits scheduled and conducted in the church's office. These completed the Guidelines for Internal Audit Review for UU Congregations.

In September 2020, a schedule was established and implemented. Audits were conducted in the months of September 2020, October 2020 (2), November 2020 and December 2020.

The following were some, but not all, of the documents reviewed for accuracy and completeness:

- Wages were properly paid, and state and federal taxes were filed.
- Income and expenses were properly recorded.
- Bank accounts were reconciled.
- Church assets are safeguarded and insured.
- Computer records are backed-up and safely stored off-site.
- Access to computer information is password protected.
- Status of Endowment account balances were reviewed.

During the audits I discovered the following items that needed to be addressed:

1. Checking accounts had not been reconciled since 2015.
2. Endowment accounts needed to be updated monthly showing current balances. Quarterly distributions must be posted and included in the monthly financial reports.
3. Budgetary process should be reviewed and expanded to include an explanation of variances noted in the monthly financial reports.

The first two items were corrected by December 2020. The third item will require approvals.

As of this writing, I have developed an initial Auditing Process for the church's Endowment accounts. The results of this audit will be forwarded to the Parish Board.

I would like to welcome our new Business Administrator, Pam Sharrio.

Respectfully submitted,

Joe Brouillet

## **Stewardship Team**

This is the second year of the trial run to separate Stewardship (the fundraising duties) from the activities of the Finance Committee. The transition was severely hampered due to the COVID closedown of the church and life in general. I fully expect we will continue the trial run with the hope that the 2021-22 church year will return to some form of normalcy and we adopt the change in the Bylaws permanently.

Other than the Annual Campaign, which has gone extremely well, the Stewardship Team has been relatively dormant.

Rebecca Brodish, the Board Chair, Reverend Rebecca, and I met with Mark Ewert, a UU stewardship consultant, in November 2020 to help develop support for our Stewardship Team. We put the project on

hold until FRS hired a new Business Administrator. Pam Sharrio recently joined FRS and once she is up and running, I assume we will move forward with Mark's proposal.

After some significant FRS staffing changes (hiring a new Director of Congregational and Community Outreach and a new Business Administrator), Vernon Ellis assumed the Stewardship Chair role mid-March to help jumpstart the committee moving forward. The Stewardship Team, working with the recently hired staff, met weekly for a month to determine whether we could do an online auction or raffle. After looking at the amount of preparation time needed for an auction, we did significant research into running an online raffle in Massachusetts. We determined our only option for this church fiscal year was going with a raffle. The Dinner for Two Anywhere in the World is back and completely online. We hope that there will be pent up travel demand and the tickets will sell swiftly.

We have also re-ignited the work on the Legacy Circle. Kim Kenly and Jim Supple have been generating copy for a web page/brochure and working on the mechanics of how this will work for FRS. We hope to have this launch next church year.

Starting Monday, May 10, we will be charting the course for the upcoming year.

Respectfully submitted,

Vernon Ellis for the Stewardship Team

## **Trustees of the Endowment**

### **Overview of the FRS Endowment**

The FRS endowment is a result of more than 200 years of philanthropy by members and friends of our church community. While invested on a combined basis, the Endowment is a series of permanent funds that provide an ongoing source of income for a specific purpose. These funds, detailed later in this report, fit into one of three categories:

- **Capital Funds** - These are designated to support spending on our buildings or other capital assets.
- **Community Funds** - These are designated to support the FRS community activities and a broader community mission.
- **General Funds** - These are designated to support the current operation of the church. Our Endowment is an essential element of our ability to plan for the long-term and provide a stable and significant source of income to support current operations.

### **Trustees' Responsibilities**

It is the role of the Trustees, elected by the membership of FRS, to oversee the investment of the Endowment. The Trustees approach this responsibility in a manner consistent with their fiduciary duty and applicable laws of the Commonwealth of Massachusetts. They look to balance the need to produce reasonable current income, preservation of the funds' purchasing power for future generations of FRS members, while also investing in a manner consistent with the values of our membership. In 2015 the Trustee hired Pathstone Family Office (hereinafter Pathstone), an investment advisor experienced in socially responsible investing, to support the management of the Endowment.

## Endowment Reports

This annual status report intends to provide FRS membership with an update regarding activities of the Trustees, and the performance of the funds.

### Performance Summary as of March 31, 2021

Net of all fees and expenses, including those of Pathstone, the average annual returns on the Endowment are as follows:

One Year	Three Year	Five Year	Since 6/30/2015
41.6%	9.0%	9.1%	7.4%

The past twelve months, coming off the pandemic-induced downturn of the first quarter of 2020, were extremely strong for all of the capital markets, lifting returns of the FRS portfolio over the time period referenced above and producing returns exceeding our benchmarks in the near term. We would not expect to see these types of absolute returns to continue.

### Summary of Activities

The portfolio continues to be monitored to ensure at least 90% of our assets are invested in a manner that either incorporates Environmental, Social, and Governance (ESG) considerations or ESG portfolio screens into their investment processes. The Trustees reviewed this process and our overall investment performance quarterly, this year via video link, with our advisor in July, October, January, and again in April.

We have previously incorporated into the Endowment specific screens to avoid exposure to fossil fuel companies (as measured by fossil fuel ownership) and companies that derive revenue from tobacco products.

This year, the Trustees also recommended to the church additional restrictions that will avoid exposure to civilian weapons manufacturing and that of non-conventional military weapons.

Through our advisor and a shareholder activist organization known as “As You Sow,” the Trustees have participated as co-filer of several shareholder resolutions to encourage better corporate governance in the areas of:

- Sustainable packaging policies of plastics
- Greater disclosure of corporate diversity, equity, and inclusion data
- Climate disclosure and other measures to reduce greenhouse gas emissions
- Disclosure of pesticide use in agricultural supply chains
- Climate transition plan reporting
- Sustainable policies for electronic waste

Each of these efforts, filed in conjunction with other like-minded investors, are designed to encourage companies we do own to function better as corporate citizens.

As begun last year, the Trustees recommend again this year that the church continue to reduce the level of spending as a percentage of the Endowment to 4.5% for fiscal 2022 to level off our annual Endowment drawdown rate to 4.0% in the near future. The Trustees believe that despite the near-term



investment results, this remains a prudent course of action to preserve the future success of the Endowment.

Finally, members of the Trustees, along with members of the Committee on Human Services, work to develop a recommendation for the Parish Board to better allocate the assets held by the church that have been previously distributed from the Swasey Orphan Fund portion of the Endowment.

<b>FRS Endowment Funds</b>	<b>Value as of 31-Mar-21</b>
Parish Fund	\$1,003,758.18
Building Fund	\$150,578.70
Stover Fund	\$60,545.05
Fowler Fund	\$18,008.44
Bailey Fund	\$226,667.17
Alliance Fund	\$90,456.65
Swasey Orphan Fund	\$175,509.74
Swasey Income Fund	\$202,892.47
<b>Total Value</b>	<b>\$1,928,416.40</b>

Respectfully submitted,

Jim Supple

## REPORTS FROM THE MINISTER, AFFILIATED MINISTERS, AND STAFF

### Minister's Report

Dear members and friends,

People are getting vaccinated at an increasing rate, with hopes of coming close to herd immunity this summer. We are emerging from the pandemic. The whirl and complexity of emotions surround us, individually and as a church community. We live with the tensions of loss, grief, and gratitude coexisting together in ways never previously experienced.

Thank God for this beloved church community. It has sustained us throughout this year.

It has been hard to be apart from one another, worshiping online, running the business of the church remotely, and sharing our minds and hearts with each other with the help of Zoom and other technologies. Our ministry theme this year was Imagine, something we were forced to do in all aspects of church life.

We rose to the challenge: we imagined, we created. We handmade meaningful and varied worship services, meeting outside and using Zoom, YouTube, and prerecorded video. We cared for one another with love and thoughtfulness through telephone outreach, online communications and programming, and handwritten notes. We made difficult but necessary decisions about keeping our buildings closed to do our best to protect our members, friends, and staff.

Through it all, we not only survived, but thrived, much because we let go of idealistic and unachievable standards of perfection and turned instead to the core aspects of our foundation: Values, Mission & ends (VME). We unanimously approved our VME at a special congregational meeting last September, with the addition of *spirituality* as one of our core values and a few other edits in the wording. Now a Core Team is working with the congregation and staff to articulate and set priorities on measurable goals to advance the work of the congregation over the next five years.

Ours is a vibrant congregation with plentiful programs and ministries, too many to list. Two highlights this year are the Exploring Elderhood Programs which offered support, information, and connection to dozens, and the enduring support and care offered by the 70 Parish Friends and Pastoral Care Associates through calls, notes, and Thanksgiving pies. I hope you take the time to read this report and connect with all the important things that have happened this year at the FRS.

In addition, our congregational commitment to and engagement with climate justice and racial justice deepened. The Climate Action Project oversaw significant work for energy conservation in our buildings, funded largely by state tax incentives. The Anti-Racism Core Team, along with the work of FRS members, community members, and staff, worked hard on several initiatives including creating the "Hate Has No Port Here" video, offering Seeing White series throughout the year, and initiating a congregational-wide conversation about becoming an anti-racist congregation.

My engagement with the city and surrounding communities expanded and deepened this year, creating valuable relationships I am honored to nurture. This year started my tenure on the City of Newburyport's Diversity Equity and Inclusion Task Force, co-hosting a monthly radio show called on public access with Mary Jacobson called "Spirit Matters," serving on the Council of the Mass Convention

of Congregational Ministers, and chairing the Newburyport Clergy Association. It is a joy to see the church expand our network and partnerships.

We welcomed three new staff members this year. Cynthia Walsh became our Director of Congregational and Community Outreach in October 2020, Andrew Bakhit joined as our Multimedia Specialist in March, and Pam Sharrio became our Business Administrator in April 2021. Many thanks are given to Tom Himmel who served as our Interim Director of Finance and Administration from December 2020 – March 2021. We also thank Kristen Miller and Sharon Broll for their tenures and commitment to our Young Church Choir and Teen Choir, and to our Young Church, respectively, as staffing adjusted to meet the evolving needs of our children, youth, and families.

We have been fortunate not to have lost members to COVID-19, and we mourn with our members who have lost family members and loved ones to the virus. We remember those members who died this church year, all of whom will have memorial services in the next church year. These include Beth Cawley, James Dyer, Pat Ouellette, Ruth Rankin, and Erika Marquardt.

We celebrate the life and ministry of Reverend Bertrand Steeves, Emeritus Minister, who so ably served our congregation from 1956-1994. His vision and his commitment to justice, our faith, and this congregation will persist in memory as long as does the First Religious Society in Newburyport.

We also welcomed 18 new members to the church who joined during the pandemic from March 2020 – May 2021.

The cycle of life and community will continue as we celebrate, on the same day as our Annual Meeting, the ordination of Sophia Lyons on May 23, 2021, an honor and privilege of our congregational polity that will help us do our part to ensure the health and longevity of Unitarian Universalism.

I conclude this letter as I do every worship service and email, “with gratitude.” This year, those words hold special meaning. I offer deep thanks to the members of the Parish Board and all the Committees and Teams for their tireless work this year, to our incredible staff team, and to each of you for being you and for being part of our beloved congregation.

With gratitude, faith, and love,

Reverend Rebecca

**The Reverend Bertrand H. Steeves**  
First Religious Society Fourteenth Settled Minister

Served from 1956-1994

**March 16, 1926 - September 16, 2020**

*The church, to be worthy to be called a church, must be relevant to the times and society in which it lives. It has been my purpose to make our church worthy of this heritage by making it relevant to society.*

-Rev. Bertrand Steeves, 1965



Bert was born on March 16, 1926 in Ayer, MA, one of five children born to Elizabeth (Vosmus) and Rev. Earle R. Steeves, who served as minister of the First Congregational Society (Unitarian) in Leominster. Although he briefly joined a Congregational church in his teens, Bert, along with his brother Addison, would go on to serve the Unitarian ministry.

In 1949, Bert received a B.S. in Education from Fitchburg State Teachers College after his studies were interrupted by military service; from 1944 to 1946, Bert served in U.S Army, nine months of which was in Italy.

He enrolled in Harvard Divinity School, during which he served, in the summer of 1950, as a student minister in Temple, ME. He graduated with an S.T.B. in 1952.

In that same year, Rev. Steeves was ordained by the First Congregational Society (Unitarian) in Leominster. Both his brother—by now, a Unitarian minister—and his father participated in the service.

Also in 1952, Bert married Maxine Hertel. The couple would go on to have three children: Jonathan, Kathryn, and Christopher.

From 1952 to 1956, Rev. Steeves served First Parish Church in Pembroke, MA. In 1956, he was installed as the fourteenth settled minister at First Religious Society, Newburyport, MA. At his installation ceremony, his father Rev. Earle Steeves delivered the charge to the minister, while the charge to the congregation was delivered by his brother Rev. Addison E. Steeves, who by then was serving as minister of the First Church and Parish in Dedham (MA).

Rev. Steeves was deeply involved in denominational as well as community activities. Within Unitarian Universalism, he served on the Clarence R. Skinner Award Committee, the New England Unitarian Universalist Ministers Association Consolidation Committee, and on staff at Liberal Religious Youth (LRY) Week on Star Island. Within the Massachusetts Bay District, Rev. Steeves served on the Nominating Committee, the Fundraising Committee, as Director of the District's Churchmanship and Ministry Department, and as a ministerial advisor to the Universalist Church of Gloucester, MA.

In the community, he served on the Executive Committee of the American Red Cross (Newburyport Chapter) for twenty years; on the Board of Directors for the Children's Aid and Family Society for a decade; on the Board of Directors of Visiting Nursing of Newburyport; on the regional board of the Massachusetts Anti-Discrimination Committee; as President of the Merrimac Valley Bible Society; as President, Vice President, and Program Chair of the Greater Newburyport Clergy Association; and as founding member and on the Board of Directors of Link House, one of the first substance use treatment facilities in the North Shore.

During his long ministry in Newburyport, Rev. Steeves was recognized as a leader on justice issues, whether divesting the church's funds from South Africa in the 1980s—as a condemnation of apartheid—or his 1961 risky, public stand against discrimination and prejudices. For the latter, Rev. Steeves received the city's Nancy E. Peace Action Against Prejudice Award, and yet his devotion to justice was driven by his ideals. One parishioner recalls Rev. and Mrs. Steeves going out at night, spray paint in hand, to cover racial epithets that had been written on buildings.

Rev. Steeves carried out these aspects of his ministry, and all others, with humility. A former parishioner recalls, "I remember Bert once wryly telling me how he leads in the social action of the Church. He said, 'I watch how things are developing on any issue to see where the march is headed, and then I run

around to the front to show my leadership.’ Of course, that was untrue, but it is an excellent example of his endearing, self-deprecating humor.”

In 1994, Rev. Steeves retired from the Newburyport congregation and was given the title Minister Emeritus. Despite his retired status, and in part to create some distance so that the Newburyport congregation could create their new chapter, Rev. Steeves briefly served the Kearsarge UU Fellowship in New London, NH.

Bertrand is survived by his wife Maxine (Hertel) Steeves; his children, Jonathan Steeves and his children Stephanie, Samantha, and Justin and their mother Debra (Baikewicz) Steeves; his daughter Kathryn Steeves and her husband Stephen, and their children Nathaniel and Jacob; and his son Christopher Steeves and husband Thomas Brewer.

Service plans will be announced sometime in 2021.

In lieu of flowers, donations may be made to the First Religious Society Unitarian Universalist where he served as minister from 1956-1994, and Link House, Newburyport, that he helped found.

--from the UUA Ministerial Obituaries

## **Community Minister Affiliated**

I continue to appreciate the opportunity to be an Affiliate Minister of FRSUU, especially during this challenging year.

I am now more than two years out from my December 2018 retirement from my work as a hospice chaplain, and I am enjoying being more in charge of how I spend my time. I look forward to continuing to be a part of the ministry of FRSUU.

This year I again participated (virtually, of course) as a reader in the Christmas Candlelight Service. On Valentine's Day, I led a worship service with a focus on "The Practice of Love." Last summer I provided pastoral coverage for Rev. Rebecca for a week while she was away.

I think this congregation – members, friends, and staff – has done an amazing job of maintaining (and even strengthening) the vitality of its inner life and its ministries in the larger community in the face of a very difficult year. I'm happy – and proud – to be a part of this faith community.

Respectfully submitted,

Rev. Stanton H. Barrett III

## **Community Minister Affiliated**

It is an honor to serve as Community Minister Affiliated at the First Religious Society, Unitarian Universalist under the leadership of Rev. Rebecca Bryan. I am an ordained Interfaith Minister through the Chaplaincy Institute of Maine or ChIME. COVID-19 regulations reshaped my ministerial practices. The last year required new directions for identifying and responding to the spiritual, emotional, and physical needs of our community. I continue to serve on the Pastoral Care Associates Team and participated in the World Religions Group until we took a break from meeting last March. During the Summer of 2020 I was emerged in discernment about my role in racial equity issues. The "Me and White Supremacy" group led by Julie Parker Amery helped me to understand what it means to be anti-racist.

I continue to be on call for pastoral coverage when Rev. Rebecca takes brief breaks. On Sunday December 6, 2020 I delivered the sermon on "Diverse Ability, Ableism and Allyship." I believe we are a kind and loving community who "welcome people in all their diversity and create belonging for one another." I have opened dialogue around being fully inclusive to people with visible and invisible handicaps in our community. To this end, we watched and discussed the award-winning documentary "Crip Camp" and read and discussed the book *Sitting Pretty: The View from My Ordinary Resilient Disabled Body* by Dr. Rebekah Taussig. Howard Mandeville and Julia Mandeville O'Leary continue to offer me guidance and support in establishing future initiatives. Bill LaPorte-Bryan has provided me with valuable information about the process for applying for the AIM - Accessibility and Inclusion Ministry Certification, which would be a lengthy multiyear process requiring a dedicated team. AIM is a certification program created by EqUAl Access in partnership with the Unitarian Universalist Association (UUA). Bill spearheaded the process of becoming AIM Certified for the Unitarian Society of Hartford, Connecticut.

I work as a consultant for the Massachusetts Department of Elementary and Secondary Education, Office of Approved Special Education Schools (OASES) and remain on the governing board of the Interfaith Ministers of New England. As a Chaplain, I meet with grieving families to plan services at

funeral homes and do graveside memorial services and interment. While typical grieving processes were disrupted this year, newly imagined ways for families and friends to gather to process and express their grief were created and implemented.

Respectfully submitted,

Rev. Helen Murgida

## **Director of Children's Ministries**

This has been both a challenging and rewarding year for Young Church. It has required flexibility, patience, curiosity, and compassion, both for myself and for our families. In August, I offered a Q & A night for parents, to discuss their family's challenges in these unprecedented times, and how our programming might best support them. It was clear that there would be no "one size fits all" approach to programming. My goal was to create as many different ways as possible to connect with our families, to meet them where they were at and to adjust accordingly. This church year we offered regular meetings on Zoom and outdoor in-person events, along with volunteer opportunities to participate in video projects and intergenerational services.

### **Weekly Young Church on Zoom**

Throughout the church year, Sharon Broll and I have met with children and families most Sunday mornings for Young Church Zooms. All ages have joined us for chalice lightings, sharing joys and concerns, playing games, and hearing stories. Our time together has evolved sweetly throughout the year. We've laughed, learned more about one another, and explored how to be an ally and an activist.

One of the silver linings of having Young Church on Zoom has been the ease with which we have been able to welcome special guests. In addition to staff and congregants, we've hosted some amazing folk from outside of our church "walls."

Palana Belken, a trans activist, joined us on Trans Day of Remembrance. Kailey Burke of Nourishing the North Shore joined us to talk about food insecurity as part of our participation in an FRS Food Drive. We also developed a monthly Young Church Diverse Storytime, in partnership with the Performing Project, a musical theater program for students in Lawrence, MA, featuring stories mindfully chosen to represent diverse voices and experiences, read by Performing Project students.

### **Middle Schoolers**

We began the year with a plan to offer weekly Zooms for our Middle Schoolers, meetings that would be geared towards creating a feeling of connection as well as exploring individual and social identities in the context of anti-racism work. Attendance for this was dismal. While we wanted to provide programming options, we did not want families to feel overwhelmed, guilty, or pressured. We adjusted to monthly meetings in November. December was our last meeting. Once it became clear that these meetings were not what our middle school families needed, we invited them to join in the Sunday morning Young Church Zooms as well as all of our other programming options.



## **In-Person Events**

Keep the Flame Alive - We began the RE season with an in-person family drop-by event outside of FRS. Families were welcomed to come by and make a social justice craft. It was a beautiful day, and it was lovely to connect with some of our families.

Wild Church - On October 18<sup>th</sup> we held an outdoor Young Church service at Atkinson Common. We built a nature altar and Kristen Miller led us in a drumming circle with all kinds of percussion instruments. This was a love-filled event and very well attended.

## **TFAA Videos**

The Time for All Ages videos were another chance to engage and connect with our Young Church families. We made four videos: "You Are Loved," "All Souls Day," "Rose, Bud and Thorn," and "Earth Day."

## **Intergenerational Services**

Christmas Pageant - This was a new challenge. Initially, I thought we'd have to prerecord this service, using individual video clips, but I didn't want to lose the sense of connection that comes from being together live, in the moment. As it turned out, the way to accomplish this was a Zoom webinar and thankfully Theater in the Open offered to host this event on their account, as our church account doesn't include this feature. Costumes were distributed and scripts were emailed - we had over 20 participants of all ages in this service and it was truly a joy.

Old Turtle and the Broken Truth - This was a service we'd been planning just as everything shut down during March of 2020. We finally had this service in February 2021 as another Zoom webinar. Again, we had over 20 participants of all ages, as well as original artwork. It was lovely.

## **Social Justice Projects**

Little Free Diverse Library - In March we announced that FRS will soon be hosting a Little Free Diverse Library outside of Parish Hall. Inspired by Sarah Kamya of Arlington, MA who started a movement of Little Free Diverse Libraries across the country, these libraries center diverse authors, stories, and voices. Again, in partnership with some of the staff at Theater in the Open, we had our library structure built. We plan to have it installed by the end of the church year and look forward to accepting book donations to fill it up!

Indigenous Peoples' Day Initiative - This fall, I read about a group of students in Portsmouth, NH who are working to rename Columbus Day in their city, and I thought a similar effort in Newburyport would be aligned with our congregation's mission and ends. Sharon did some research and passed along information about Indigenous Peoples' Day MA, a coalition of organizations and individuals who work to get Indigenous Peoples' Day legislation passed in Massachusetts. This winter, Cynthia Walsh, Betsy Hazen, and I met with Mahtowin Munroe of Indigenous Peoples' Day MA to talk about their work and learn more about how to start this effort in our own community. A few more supporters joined us at our FRS Passion Action Fair, and we are planning an open meeting on May 1<sup>st</sup>. I'm excited to see our Indigenous Peoples' Day Initiative continue to evolve.

I was saddened to learn that Sharon's position as Religious Education Assistant is ending this year. I am so grateful for her guidance, steadfast support, and sense of humor as I navigated stepping into this role and, soon after, while figuring out how to offer programming throughout a global pandemic.

As a Young Church community, we are looking forward to more outdoor in-person events now that the weather is warming up, hopeful for what next year will bring, and grateful for the meaningful connections we've made with one another in such a challenging year.

Respectfully submitted,

Mara Flynn

## **Director of Church Music**

As the old saying goes, "The show must go on." Despite the ongoing challenges of the COVID-19 pandemic, the FRS community has demonstrated extraordinary and admirable commitment to remaining connected through this time. In this respect, the music program did not disappoint. Members and friends contributed enormously to the life of the church through musical offerings of various kinds as we continued to worship online and outdoors.

Before the official start of the church year, we held our first of several services outdoors at Atkinson Common, with Greg Garnache adding his beautiful guitar playing to the experience. Our outdoor services continued to feature musical contributions from Kristen Miller, Becky Dill, and Ken Okaya. When we restarted our outdoor worship in April, we were very blessed to welcome percussionist Mamadou Diop, who shared his Senegalese drumming style and brought along FRS member Julie Menin to play alongside him. Our worship outside was supported by portable technology managed by Rob Close; a stripped-down version of our Sanctuary system was brought outside and made it possible both to amplify our worship leaders and provide a basic streaming experience to those unable to join in person.

As we confronted an entire church year of virtual worship, A/V coordinator Rob Close remained steadfastly solution-oriented and creative in making appropriate improvements to our technology. A very generous anonymous gift allowed us to purchase several valuable pieces of equipment that streamlined our setup, increasing both consistency and flexibility. We also incorporated a Zoom option to allow for a slightly different manner of worship experience; this addition also allowed for several all-Zoom services to occur and permitted more and different voices to participate on Sunday mornings. Our increased technical flexibility also allowed for more musicians to participate through video content; members and friends who supported the church in this way include Gay Pearson, Lea Pearson, Alan Seale, and others.

## **Adult Choir**

The Adult Choir reconvened online in September, rehearsing weekly over Zoom. This format posed many challenges that the choir members overcame extremely admirably. With the support of Rob Close, we developed a method to produce choir anthems virtually, with each singer recording their part as a solo that was then mixed with the contributions of everyone else. Despite the challenging and sometimes tedious nature of this approach, the choir was able to share seven pieces, including music by Dr. Ysaye M. Barnwell, Elizabeth Norton, and W.A. Mozart. I am extremely grateful that the members of

the Adult Choir were so willing to roll up their sleeves and try many new ways of making music; while they could not replicate the special qualities of singing together, it was a special joy to participate in their perseverance and leadership during the pandemic. By gathering virtually, we were also able to join with UU singers from several other congregations across the North Shore to produce an anthem for our joint Easter Sunday service. With the growing evidence that vaccination is very effective, I am increasingly hopeful that we will be able to be making music together sooner rather than later. Bravissimo!

### **Candlelight Chorale**

The Candlelight Chorale faced the same challenges as the Adult Choir, and rose to the occasion with the same level of commitment. The group recorded five anthems and carols, including the traditional favorite, "O Come, All Ye Faithful." The Young Church Choir and Teen Choirs also contributed to the service as in years past, joining in on "Dona Nobis Pacem" and recording a special version of "Peaceful Night, Starlit Night" by Elliot Z. Levine. Rev. Rebecca, Rev. Helen Murgida, and Jason McLin added their voices with readings, and Rev. Rebecca contextualized this service within the context of the pandemic. The service was edited together by Sarah Blackstone and premiered on our YouTube channel, where it has been viewed over 700 times. While it was, again, not the same as services in years past, it was very special to be able to continue this unbroken tradition with a service unlike any other.

### **Youth Choirs**

In the fall, the Young Church and Teen Choirs continued to convene online, led by Kristen Miller. They prepared music for the Candlelight Service as well as other music, and stayed engaged and connected with each other. Unfortunately, the pandemic made it especially hard to make music together, even virtually. This situation, among other factors, has led to a major transition in these programs.

We are very saddened by Director of Youth Music Kristen Miller's departure from the staff team. For a decade, Kristen led our young people in song and spirit with a powerful sense of care and commitment to their well-being and their growth not just as musicians, but as full people. We are immensely grateful that she has shared so many of her talents with FRS over the years, and I am personally grateful for her support and guidance during the beginning of my time as Director of Church Music. We wish her the very best on her future endeavors and a welcome embrace whenever she is with us again.

In January and February, Lea Pearson graciously offered the Young Church and Teen Choirs several weeks of explorative programming, investigating the hymn "Lift Every Voice" and working with the Young Church Choir on writing their own original song. Moving forward, we will be exploring new ways to offer music programming to the young people of FRS.

### **Jazz Vespers**

The monthly Jazz Vespers services moved online in an unexpectedly successful way. We began in November with an experimental service featuring the FRS House Band and saxophonist Danny Harrington. The success of this event led Danny to offer to lead four more Vespers services in the winter and spring; we are immensely grateful for his contributions and willingness to lead a different kind of music making at FRS. In March, these musicians, alongside Gay Pearson and guests from the Pentucket Jazz Band, led a Jazz Service online, with an excellent sermon from Lark Madden. Special thanks to Lark for coordinating the Jazz Vespers services, especially this year. We all look forward to sharing these experiences in person!

In summary, I am deeply grateful for the musicians of FRS for maintaining a commitment to sharing their gifts with the congregation in whatever format was possible throughout the pandemic. The challenging situation offered some opportunities to expand our skillsets and reach that perhaps would not have otherwise occurred. I look forward to the future when we are able to share music in person again – our creativity will be boundless.

Respectfully submitted,

Justin Murphy-Mancini

## **Director of Congregational and Community Outreach**

### **Membership Growth and Engagement**

We welcomed 18 new members into our parish during the 2020-2021 church year. New parishioners joined from Newburyport, Merrimac, Amesbury, Boxford, West Newbury, South Hampton, NH, and West Hartford, CT.

#### Community Engagement Initiatives:

The “Hate Has No Port Here” video has been viewed over 1,900 times on YouTube. Placards with this message and a QR code to the video were placed in storefronts and distributed to residents throughout the greater Newburyport area. More than 50 people signed the “Hate Has No Port Here” pledge, with many signers not affiliated with FRS.

In January, FRS hosted a virtual book discussion with William Schulz and Sushma Raman, authors of *The Coming Good Society*. The discussion was focused on the state of human rights in the age of emerging technology. This event was open to the general public and 50 people participated.

In March, FRS hosted a virtual Passion Action Fair following the Sunday service. 18 ministry groups exhibited and engaged participants through brief presentations. More than 60 attendees participated.

A new FRS initiative that would involve building a broad coalition of community support within Newburyport is starting to take root. The goal of this initiative is to have the city rename Columbus Day to Indigenous Peoples’ Day.

Virtual coffee hours continue to be held over Zoom and during the spring months parishioners are hosting in-person socials out front of the church.

#### **Communications**

The weekly Steeple continues to have above industry average open and click through rates. There are 654 subscribers with an average 45% open rate (average open rate for the industry is 35%). Parishioner Bob Higgins supports the production of the printed Steeple which is mailed weekly to congregants without internet access.

Since January 2021, the FRS Communications Team has regrouped and is currently working on developing a new member communications strategy focused on keeping people better informed of what is happening as well as engaging people more in the ongoing parish activities. In addition, the Communications Team is working on updating design, user journey, and content on the FRS website.

Members of the Communications Team are:

Cynthia Walsh

Ed Meagher

Jeff Litcofsky

Lynn Kettleon

Peter Francese

Sandra Thaxter

Tom Stites

Vern Ellis

**Database Management (Realm, also referred to as FRS Connect)**

Cleaning, updating, and establishing a clear pathway for engagement must be prioritized.

Reports pulled from Realm as of April 30, 2021:

- 487 members
- An estimated ¼ of the total membership logged into FRS connect in the past year

A working group has been formed to address data cleanup and establish best practices for maximizing use of Realm.

Members of the Realm Working Group are:

Cynthia Walsh

Diane Carroll

Ed Meagher

Susan Ricker

Pam Sharrio

Respectfully submitted,

Cynthia Walsh

## Director of Faith Formation and Spiritual Exploration

*“You’re muted!”—perhaps my most-uttered phrase of 2020-21*

There’s little need for me to write an exposé on how unusual this year has been, so I will spare that and get right to the highlights.

### Youth Ministry Highlights

Journey, Resilience and Fortitude Program: Recognizing the need for models of resilience at this time and honoring that this would have been a youth justice learning trip year, Steve Costello, Janet Sutherland, Mike Dorsey, and I put together a virtual trip program for our youth. We brought in speakers via Zoom, supplemented with learning sessions and in-person (safe) rituals. We partnered with Borderlinks (Latin American migrants) and the Living Legacy Project (veterans of the Civil Rights movement) to meet people who have embodied resilience.

Youth Group: Through Youth Group Coordinator Becky Dill’s loving nurturance, the Senior High Youth Group continued to meet each week virtually through the pandemic, providing our youth with a safe space to share their experiences and challenges. Many thanks are due to co-advisors Ken Okaya, Steve Costello, and Eileen Vargas-Costello.

### Adult Faith Formation Highlights

“Seeing White”: I first offered this podcast series discussion group in the spring of 2020, thinking it would be a one-time deal. Interest in it, however, was apparent, so I continued to offer it. There has been a total of eight groups, comprised of a total of 67 FRS friends, members, and others. This program works well over Zoom and has been good for laying some groundwork for further antiracism work that we will be undertaking next year.

Foundations of Unitarian Universalism: Cynthia Walsh and I worked together on a program geared both toward newcomers/people considering membership as well as longer-term members who want a better understanding of our faith. 25 people participated, ranging from very new to very long-term. Now that it has been created, the program can be easily offered on a regular basis moving forward.

Young Adult Group: Mike Dorsey, Janet Sutherland, and I continue to meet regularly with Young Church “alums,” primarily people in their early twenties, via Zoom. This group has evolved into a strong and supportive community.

Pods: Several of the care pods that were created at the start of the pandemic, as well as a number of former chalice circles/small ministry groups continue to meet virtually, providing support, connection, and spiritual exploration for members.

Weekly spiritual exploration: My Tuesday morning “spiritual practice” drop-in group continues to meet weekly, as does Susan Cooper’s Wednesday morning drop-in guided meditation. These are examples of programs that might continue to work well via Zoom once we move to a hybrid model of church.

So many other groups continue to flourish. I offer staff support to many groups in the congregation, including Exploring Elderhood Together, Chalice Circles, Pastoral Care Associates, and the Anti-Racism Initiative Core Team (all of which have reports included in this Annual Report). I’ve been a witness first-

hand to how diligently these groups have been working to keep the programming going. It's through the efforts of so many committed individuals that the work of the church has continued through this time.

Great work, everyone!

Respectfully submitted,

Julie Parker Amery

## **Interim Director of Finance and Operations**

I took on the role of Interim Director of Finance and Operations in December upon the departure of Kristen Fehlhaber after three years of dedicated and effective service to First Religious Society. This was a challenging experience, but also deeply gratifying. I had great help in moving up the learning curve that was involved in covering the position, doing so thanks to the terrific support from Rev. Rebecca, Diane Carroll, the members of the Finance Committee, Rebecca Brodish, and from Kristen, who willingly served as an ongoing resource.

The church continued to be closed throughout this time. Most work was done from home with time in the office as necessary to make use of systems and information only accessible on-site. Diane Carroll, Office Administrator, was in the office periodically to handle tasks needing to be done there - we all owe her a debt of gratitude for the extra work she took on to keep things running smoothly. Thanks also to current technology (Zoom), which allowed meetings of all sizes to take place much as they usually would have. Our experiences using it will serve us well even after the church and office are able to re-open, as we have learned how to engage effectively with others and to share ideas and information from our different locations. These are abilities we may want to make use of going forward, with potentially having meetings of various sorts where some are present in the same location while others are able to participate remotely.

Staff Additions: Three new employees joined the FRS staff this year: Cynthia Walsh in October as Director of Congregational and Community Outreach, Andrew Bakhit in February as Multimedia Specialist, and Pam Sharrjo in April as Business Administrator - a new position, replacing the one of Director of Finance and Operations, and based on a role description better suited to the manner in which FRS now operates. All three bring a wealth of experience to us and will be great additions to our staff.

Special Campaign Update: We are entering the final months of the three-year Special Campaign which was started in 2018 with a goal of raising \$1.1 million to fund three distinct projects, the largest of which was the restoration of the steeple. The other projects are the mortgage on the Lower Meeting House and providing a Futures Fund. A letter from Lark Madden and Rebecca Brodish was sent at the beginning of February which detailed the background and status of the Special Campaign at that time. What I highlight here is the largest of the fund sources, which is the 156 commitments from FRS members and friends that were made to the Special Campaign and totaled \$761,250. To date we have collected \$730,063 toward that. We have made great progress, thanks to all of those who have contributed! The Special Campaign has accomplished a significant part of its objectives. For any who are new to FRS and who would like to participate, there is still time! If you would like more information about the Special Campaign and/or its goals, please feel free to contact me or Pam Sharrjo.

Facilities: Things were relatively quiet on the facilities front. The ongoing pandemic and the closure of the church meant that we did not do any rentals of the facilities. A repair to the roof over the choir room was needed to resolve a problem with leaks into the building; that was successful. Our sexton, Donny Rogers, has been engaged in repairing and painting the ceiling in the choir room, and has moved on to refinishing the floor. During the winter, when we discovered our expenses for snow removal were running unexpectedly high, Donny generously volunteered to take on more of the snow-clearing himself.

Despite the oddity of the times we are in, I found the four months I served as “your DFO” to be very rewarding. I appreciate the forbearance of others while I was trying to figure out the answers to the questions that came my way and take pride in the fact that together we kept things running fairly smoothly. I also appreciated getting an inside view of how the staff operates, especially as a team, and have a new appreciation for what they invest in their work together under the leadership of our beloved minister as well as in their respective specialties. FRS is the richer for them all!

Respectfully submitted,

Tom Himmel

## **Sexton’s Report**

These are the tasks completed during COVID:

- Painted kitchen in Parish Hall
- Painted trim in Parish Hall
- Painted hallways going upstairs in Parish Hall
- Painted stairs outside front and back
- Planted gardens by Parish Hall
- Cleaned out basement for Climate Action Project group
- Cleaned steeple
- Painted parts of entry way in Meeting House
- Pursued and arranged steeple roof replacement
- Repaired and painted tin roof in choir room
- Plastered and painted choir room
- Sanded and refinished choir room floors
- Painted pews in upstairs balcony
- Took down picket fence by Lower Meeting House entrance

Respectfully submitted,

Donald Rogers



## **REPORTS FROM FRS GROUPS**

### **Addictions Ministry**

The Addictions Ministry at FRSUU is a group of individuals who are recovering/recovered (how we describe ourselves is a personal choice) from addiction to substances or behaviors.

Team members are available to talk to anyone who asks for help. Members are willing to share their experience and offer recovery resource information. We communicate by email as needed. During the year Reverend Rebecca has forwarded requests to the team and contacts have been made.

Team members are listed on the church website. From the main menu, select Spirituality and Learning, then select Spiritual Development then Addictions Ministry.

Respectfully submitted,

Rob Burnham

### **Alliance**

Due to the pandemic this group did not meet for the 2020-2021 church year.

### **Chalice Circles Steering Committee**

The Chalice Circles program is a form of small group ministry, where FRS members and friends can consider religious and spiritual topics, including FRS Monthly Ministry Themes, through reflection, deep listening, and conversation.

The 2020-21 Steering Committee members are Diane Forman, Howard Mandeville, Beth Munro, Ted Stedman, and Linda Tulley. Julie Parker Amery serves as the FRS staff liaison. The Steering Committee oversees the Chalice Circles program and meets monthly. The committee:

- provides enrollment opportunities for church members and friends.
- handles publicity to promote the program in the Steeple newsletter, Order of Service, a brochure, and the FRS website.
- recruits and trains Chalice Circle Leaders each year. While Circles are in session, the Steering Committee hosts meetings monthly with Leaders to provide support and ongoing leadership development.
- updates and produces Chalice Circle Leader, Participant, and Administrative Handbooks.
- develops Chalice Circle session materials and maintains a library on a range of session topics.
- consults with leaders on each Circle's Gift of Service activity.
- works with the FRS Director of Faith Formation and Spiritual Exploration who organizes registration and makes referrals for newcomers and others to the ongoing Circles during the church year.

In response to the COVID pandemic at the time of planning the sixth year of the Program, the Steering Committee adapted Chalice Circles for 2020-21 to be as Zoom-friendly as possible. Two veteran Circle

leaders with Zoom experience, Annalee Johnson and Mark Hodgson, agreed to facilitate virtual sessions that met twice monthly October through January, instead of for the traditional eight months.

The Leaders and Steering Committee wish to acknowledge the work of Ed Meagher and Julie Parker Amery for facilitating Zoom Tech Checks for Circle leaders and participants prior to their first scheduled session. This support allowed the Chalice Circles to get off to a smooth start and continue with confidence.

Planning for 2021-22 Chalice Circles is on hold pending decisions regarding in-person meetings in the new church year.

Respectfully submitted,

Beth Munro, on behalf of the Chalice Circle Steering Committee

## **Climate Action Project (CAP)**

### **Mission & Goals:**

An informed citizenry insistent on urgent government action to slow climate change! In response to this need the FRS Climate Action Project plans to:

- Think globally, work locally, act personally.
- Raise awareness within FRS and the local community on the urgent need for climate action by organizing a series of events, discussions, and communications on key climate change topics.
- Grow the reach and effectiveness of our small group by attracting more FRS members and friends to join with us in this cause, and by collaborating with other like-minded local organizations and agencies of government.
- Publicize concrete actions by which concerned citizens can combat climate change in their personal lives, through government channels, and/or by participating with advocacy groups.

### **Members:**

Wendy Anderson, Carol Bousquet, David Chatfield, Bill Clary, Joanna Fernandez, Art Henshaw, Lance Hidy, Mark Hodgson, Sam Kimball, Karen Kuhlthau, Doug Latham, Anne Madden, Yvonne McQuilkin, Pete Morbeck, Gay Pearson, Linda Piergeorge, Sue Purcell, Jenny Ross, Marc Simon, Pat Skibbee, Sandra Thaxter, Susan Thorne, Joe Vecchione

### **Goals and Accomplishments:**

1. Promote Environmental Policy
  - a. Goal: to review our investments as a church and consider reducing investments in fossil fuel companies
  - b. Accomplishments
    - i. A certified electrician was hired to inspect the church's obsolete knob-and-tube wiring
    - ii. Certificates were provided that the knob-and-tube wiring was inactive
    - iii. The certificates were provided to Rise Engineering and they re-ran the costs of the Mass Save energy savings projects and the incentive assessments

- iv. The CAP group reviewed the assessments and moved forward with installing the changes to reduce energy usage in both buildings
  - 1. Church hall project included the installation of a vapor barrier in the basement over the dirt floor, followed by various forms of insulation
  - 2. The church itself required insulation in the attic, boiler controls, ceiling, and door kits
  - 3. Insulation materials were discussed with Rise Engineering and determined to be eco-friendly, and the required paperwork was completed and agreed to by Rise Engineering
- v. Thanks largely to the combined efforts of David Chatfield, Patricia Skibbee, Bill Clary, Karen Kuhlthau, and Kristen Fehlhaber, the project was completed by the end of 2020
  - 1. The expense of the project was offset by the utility company contribution, reducing the cost to the church to \$1,333
  - 2. Expected energy savings are on the order of \$3,000 annually
- 2. Develop personal awareness of climate issues and actions
  - a. Goal: disseminate information related to Climate Justice
  - b. Accomplishments
    - i. Presentations were conducted on Zoom
      - 1. Denny Dart spoke on “How to Lose That (CARBON) Weight,” April 17, 2020
      - 2. Rabbi Alex Matthews spoke on “Ethical Farming and Climate Change,” May 21, 2020
    - ii. Members were encouraged to virtually attend other events, such as:
      - 1. Attending Amber Hewitt’s presentation on Vineyard Wind company for Storm Surge
      - 2. Viewing *Kiss the Ground* and similar educational videos offered through other organizations
    - iii. No pot-luck dinners could be held because of the pandemic
- 3. Present Earth Day Service – 4/25/21
  - a. Created planning team: Doug Latham lead a team including Pat Skibbee, Annie Madden, Art Henshaw, David Chatfield, and Bill Clary
  - b. Theme—History, Accomplishments, and Goals of Climate Action Project
  - c. Due to pandemic, entire service was recorded to minimize potential technical problems
  - d. Justin Murphy-Mancini arranged the music
    - i. Included a recording of Frank Ticheli’s “Earth Song,” with Lea Pearson, Betsy Hazen, Hugh Martinez, and Doug Latham
    - ii. Included a recording of Gay Pearson playing a composition she prepared titled “Power of the Half Step.”
  - e. Rev. Rebecca’s Reflections for the service emphasized the urgency of the climate crisis and how we can respond to it: grounded in love, through the nurturing of safe places and the continuance of climate justice actions by the church

- f. Video compilation presented on history of CAP, with Art Henshaw, Bill Clary, Stella Okaya, David Chatfield, and Doug Latham
  - g. Greta Thunberg reading given by Olivia Skibbee
  - h. Order of Service photo by Vern Ellis
  - i. Diane Carroll produced the Order of Service with input from the group
4. Provide informal monthly reports to group on legislative initiatives and support
- a. Citizens Climate Lobby (legislation) – Anne Madden
  - b. Storm Surge – Bill Clary
  - c. ACES – Pat Skibbee
  - d. C-10 – Pat Skibbee
  - e. Merrimack Valley Beach Association – David Chatfield
  - f. Newburyport City “Climate” committees
    - i. David Chatfield – Resiliency Committee
    - ii. Bill Clary – Energy Advisory Committee

Respectfully submitted,

Mark Hodgson for the Climate Action Project

## Community Human Services

Community Human Services directed and managed a wide range of programs for local people who are struggling and in need of assistance. The Community Human Services Group is comprised of Ann Haaser, Annie Maurer, Jeff Bard, Ann Power, Barbara Garnis, Linda Buddenhagen, Mary McDonald, Patrice O’Brien, Susan Cooper, Monique Bachand, and Nancy Crochier. Thanks to all FRS members who have supported our initiatives. Your donations and volunteer efforts made the below programs possible. We look forward to your continued support and participation next year.

Here is a recap of our community outreach:

After gathering suggestions from the congregation, we selected the following for our monthly **2020-2021 Sunday Shared Collection**:

- September: Jeanne Geiger Center
- October: Greater Newbury Elder Pet Fund
- November: Amesbury Holiday Program
- December: Fuel Assistance
- January: Community Service Camperships
- February: MA Coalition to Prevent Gun Violence
- March: UUA
- April: Pennies for Poverty
- May: Emmaus
- June: LGBT Asylum Task Force

FRS contributed a \$1,000 sponsorship using the Sunday Shared Collection and FRS walkers raised an additional \$730 for the **Jeannie Geiger Center** through participation in their annual Walk Against Violence.

There was one **Swasey Fund** distribution of \$1,800 this year. We have sent a petition to the Essex County Probate Court seeking a broader definition of qualified recipients for distributions from the Swasey Orphans Fund. These would be children in need and:

- At least one deceased parent, or
- A single parent household, or
- Under legal guardianship, or
- In foster care, and
- Residents of Newburyport or, if not enough Newburyport beneficiaries, residents of neighboring cities and towns (Amesbury, Newbury, Salisbury, West Newbury).

[Note: Original terms of 1915 bequest are for orphan children of Newburyport. The petition also seeks ratification of distributions already made. There is no estimate as to when the court will take up this filing.]

FRS Christmas volunteers put smiles on 40 young faces by delivering toys and 20 older faces by distributing gift cards to moms as part of the **Emmaus House Holiday Program**. There are no statistics, but we also provided FRS members access to participate in the **Greater Newburyport/YWCA/Newburyport Youth Services Holiday Program**.

From the scores of new/unused gifts donated by FRS members as part of the **Joy of Giving** program, over 30 children from Kelleher Gardens were able to select and wrap presents for their parents and caretakers. This is a program that the children, ages 3-18, greatly look forward to each year.

The **Newbury Food Pantry** food drive supplied two carloads of food and \$1,120 in cash/Market Basket gift cards to deserving members of our community.

CHS and Young Church conducted a second **Newbury Food Pantry** food drive. We wanted to attract participation from all parts of the congregation and the public. So, in addition to newspaper press releases, we also used social media and joined Zoom meetings of various church groups. The Young Church Zoom hosted Kaleigh Burke from Nourishing the Northshore, who inspired the participants to learn more about food insecurity. We ended up collecting over a thousand pounds of food donations, \$700 in gift cards, and \$1,530 in cash. We had collection help from lots of different age groups, teens, young adults, and committee members. The Newbury Food Pantry needs constant donations and is open to accept them every Thursday from 10-noon.

CHS assisted JAM in an **Immigrant Food Drive**.

During May we plan on having an **Emmaus House Diaper and Feminine Hygiene Drive**.

We will rotate the chairperson role on a meeting-by-meeting basis during 2020-2021 and Jeff Bard will serve as secretary. Anyone interested in learning more about our group can contact Jeff Bard at 978.270.3293 or jeffbard@hotmail.com.

Respectfully submitted,

Jeff Bard

## Exploring Elderhood Together

Exploring Elderhood Together provides FRSErs, age 60 and older, with an opportunity to explore what it means to age in the 2020s.

Our mission is to reflect on and discuss topics of interest, and through sharing from our own lived experience, to build a greater sense of belonging within our community.

During the past church year, we've met monthly via Zoom, presenting TED and other talks by thought-leaders with new perspectives on aging, including Elderhood itself, which is defined as a third major and distinctive stage of life, following childhood and adulthood. Our programs have covered an array of relevant topics such as Life's Third Act, Let's Stop Ageism, Being Mortal, Opening to Grief, a two-part program on Coming Out of COVID, and an upcoming special forum on the Death with Dignity movement. We meet as a large group, followed by small, facilitated discussion groups for deeper conversation. Since our launch last November, we've had a steady stream of participants, averaging some 27 people each month.

The program is overseen by a steering committee which anticipates that Exploring Elderhood will continue in the same format. We plan to survey our participants for input and feedback, as well as expand our capacity to share ideas, events, and resources. Special thanks to our steering committee which has worked hard, enthusiastically, and creatively to support our programs: Linda Buddenhagen, Barbara Garnis, Howard Mandeville, Walter Power, Carrie Schmidt, and Julie Parker Amery, staff liaison whose support and tech wizardry are appreciated.

Respectfully submitted,

Alex Mezey

## Friday Book Group Report

**Purpose:** Friday book group is a welcoming and valuable FRSEU resource in providing opportunity for both personal growth and relationship building. We turn to fiction and nonfiction to stretch our intellect, challenge our belief systems, and increase our compassion for differing perspectives. And to have FUN!

**Membership:** The group is open both to the church community and to friends of the church community. Attendance varies from 7-8 people to larger meetings of 15 or more. During the past year meeting via Zoom we have had between 9 and 14 participants on a fairly regular basis. Some former members have taken some time out, while, especially during the reading of *Middlemarch*, we have welcomed new members from the greater community. We have maintained a fairly consistent group of 12 since mid-January while reading this 800-page classic over the course of 14 Fridays. We feel this is quite an accomplishment!

**Meeting times:** We meet every Friday from 10am to 11:30am in the Lower Meeting House Room A when it is open for in-person meetings. We are currently meeting via Zoom.

**How it works:** We generally read about 50-60 pages a week. This gives us time to dive deeply into the themes of the books (fiction and nonfiction) we choose. Books are selected democratically by a series of

votes and all members are encouraged to bring book suggestions to the selection meetings. We are an open group and new members are welcome to join us on any Friday during the year.

During the summer we decided to try using a volunteer facilitator model to keep us more focused on the themes of our books and to moderate the flow of discussion. This change has been generally welcomed by the group and members have stepped up to take turns facilitating. As facilitators gradually took more of a leadership role in the discussions, the role of calling on speakers became a separate responsibility for an additional volunteer member. This opened up more facilitator opportunities for some members who were unable to see the whole group at once on their device. We also accommodated a request for closed captioning and now make it available for each discussion. We are a work in progress finding the best ways to give each other an enriching experience.

Some of the books we have read over the past year include *The Lies That Bind: Rethinking Identity, Creed, Country, Color, Class, Culture* by Kwame Anthony Appiah, *The Overstory* by Richard Powers, *Spying on the South: An Odyssey Across the American Divide*, and *Middlemarch* by George Eliot. We believe that reading together builds intimacy of the best kind-deepening our sense of community and the moral values we hold dear.

**Contact:** We send a weekly group email listing our meeting time, our Zoom link, the book we are currently reading, and the page assignment for the coming week. Susan Wilner maintains the membership email list. She can be reached at [ss1@comcast.net](mailto:ss1@comcast.net).

Respectfully submitted,

Susan Wilner

## **FRS Anti-Racism Initiative**

The FRS Anti-Racism Initiative (“FRS-ARI”) was formed in the late spring of 2020 in response to the George Floyd murder and the ongoing systemic racism found in America. Responding to a call from Reverend Rebecca, a group of approximately 60 people joined in a Zoom meeting on May 30, 2020 to understand how we might respond to and proactively address the “racism pandemic” in our country, our state, and our community.

This initial group of people (now referred to as the “FRS Working Group”) then formed a smaller Core Group with three main areas of focus:

- Within (how we can become more anti-racist as individuals),
- Among (how we as a congregation might choose to become anti-racist), and
- Beyond (how we can engage with the community and form partnerships to address systemic racism in our community and state).

Each of these areas of focus has a subgroup of people who have met over the past year to develop plans and tactics, and to take action to work toward reducing racism Within, Among, and Beyond. In addition, this work was supplemented by others in the congregation, the community, and the FRS staff.

Some of the actions taken over the past year by the FRS-ARI and other members of the congregation and staff to address racism include:

- The creation and distribution of approximately 150 Black Lives Matter signs throughout Newburyport, generating donations of \$1,555 which were sent to the Movement for Black Lives (M4BL).
- The writing and publication of a column in the Newburyport Daily News by Reverend Rebecca in June 2020 wherein she called on us to make a “personal commitment to doing what we can to eradicate racism at the personal, institutional, and cultural levels.”
- The creation and distribution of the highly impactful “Hate Has No Port Here” video, drawing attention to the issue of racism in Newburyport and surrounding communities.
- The offering by Julie Parker Amery of a total thus far of eight discussion groups around the podcast “Seeing White,” which addresses racism through the lens of being white.
- The offering by Justin Murphy-Mancini of a thought-provoking discussion group on the book *The End of Policing*.
- The development of a personal self-reflection tool by the Within Group for the use of the FRS congregation which will help us examine our own experiences, thoughts, and feelings around racism and racial justice which is expected to be released over the next few months.
- The identification and assessment of The Richmond Pledge to End Racism, a program identified by the Among Group that we as a congregation can embark on to work toward becoming an Anti-Racist Congregation. Training for the facilitators of the program takes place in June 2021.
- The support, in conjunction with JAM’s leadership, for the Louis D. Brown Peace Institute’s Mother’s Day Walk for Peace in May 2021.
- Holding meetings (currently ongoing) to discuss the Thin Blue Line Flag flying at the Newburyport Police Department. We are working to identify ways we might support people in the community directly impacted by the flying of the flag and to drive dialogue around the flag itself.

Periodic updates regarding learnings, activities, and opportunities for involvement are emailed to people on the Working Group email list. The Core Group meets once a month to coordinate and align actions among the three subgroups. The subgroups also meet once a month to move their work forward.

Members of the Core Group currently include:

Tina Benik

Rev. Rebecca Bryan

Eileen Costello

Vern Ellis

Susan Fasoli

Ann Haaser

Margaret Omer

Julie Parker Amery

Lea Pearson

Susan Stone



Sandra Thaxter

Jane Tuohy

Joe Vecchione

Respectfully submitted on behalf of the FRS Anti-Racism Initiative,

Tina Benik

## **FRS Habitat**

One of the ongoing social justice commitments overseen by the FRS Justice Action Ministry—stable, safe, affordable housing—is addressed by our congregation’s partnership with Habitat for Humanity. In ordinary times, FRS Habitat organizes the volunteer participation of FRS members and friends to help build Habitat for Humanity homes for low-income households whose current housing is precarious.

In March 2020, the COVID pandemic put a hold on our volunteer activity to help build seven Habitat homes in Salisbury for low-income, first-time home buyers. As more of us roll up our sleeves for immunization, FRS Habitat leaders are assessing when volunteers can safely renew our commitment to help build these homes. Mirroring the provisional schedule for FRS to fully re-open, FRS Habitat will target September and the beginning of our new church year to reactivate FRS Habitat volunteer shifts. We anticipate a similar commitment as before: mobilizing from six to ten volunteers to work at the Salisbury build site for a full day on the third Saturday of each month.

It is hoped that by May three of the seven homes will be ready for occupancy. The remaining homes will be move-in ready by early 2022 or sooner. The seven families chosen to own these homes are eager to settle into their new homes and new neighborhood. Many of them join volunteers at the build site to invest sweat equity by completing the construction of their new homes.

FRS Habitat sends its gratitude for a job well done to Tom McCarty, the FRS Habitat volunteer who, from the beginning, organized and scheduled our teams of FRS Habitat volunteers. Tom is stepping back from this role and is coming up with plans for traveling and exploring.

Respectfully submitted,

Howard Mandeville

## **FRS Reopening Team**

After the closing of the church buildings in March 2020, the FRS Reopening Team was formed in June of 2020 to consider how and when the buildings could be opened again. The team included Rev. Rebecca Bryan, FRS Director of Finance and Operations Kristen Fehlhaber, Jeff Bard, John Mercer, and Merryll Maleska Wilbur. Soon thereafter, Judith Fayre joined the team as the Parish Board Representative on the team, a particularly fortuitous choice given Judith's access, as an RN, to Newburyport and Massachusetts COVID-19 experience and information.

Early on, we received a considerable amount of reading material concerning this virus and viruses in general:

- The COVID Waiver from UU Fellowship
- The COVID-19 UUF Health Attestation Form
- The Church Mutual (our insurance company) Webinar – Safely returning to in-person ministry
- The MA guidelines for places of worship
- Epidemic data
- Very clear national, state, and county data
- The Massachusetts State daily dashboard
- An article called the “Science of Transmission”
- A very popular guide to risk factors, viral load x time, etc.
- A PNAS research article identifying airborne transmission as the dominant route for the spread of COVID-19
- A Google spreadsheet on individual church reopening plans
- The UUA Gathering Guide
- A General UUA page of resources
- A stream of various news articles mostly supplied by Kristen Fehlhaber
- A New York Times article on choir singing and safety and other COVID-related topics

These and other articles and the local updates from Judith gave the team members a good grounding and the sense that they could follow the science, their agreed-upon approach. Except for a few weeks in the summer, the team met every other week for one and a half hours from June 2020 to the present, for a total of more than 20 meetings to date.

During that time, the team considered and made decisions on a large number of requests to use the church buildings for various community and church purposes. Furthermore, the team worked diligently to promote safe ways that people could be together such as outdoor services, meditation in the Sanctuary, and, more recently, after-service meet-and-greet opportunities on the bricks at the front of the church.

As time passed, there were several important changes of personnel in the Reopening Team. After the departure of Kristen Fehlhaber from the FRS, we were joined throughout the spring by Interim Director of Finance and Administration Tom Himmel. He was eventually replaced on the team by newly hired FRS Business Administrator Pam Sharrio. Even more recently, on May 5, Judith Fayre attended her last meeting with the Reopening Team in preparation for her move to Vermont. She will be replaced by Meg Wiley, also a RN, whose access to local medical and virus information, we have been told, will be the equal of Judith's. Kristen (early on) and Judith (throughout) have been immeasurable mainstays in this work, and we honor them for their diligence and their clarity.

Respectfully submitted,

Rev. Rebecca Bryan

FRS Business Administrator Pam Sharrio

Jeff Bard

John Mercer

Merryl Maleska Wilbur

## **Hospitality Committee**

The Hospitality Committee sponsors social events to encourage and support fellowship in our church community. There are approximately 20 volunteers on the committee, with 15 who participate on a consistent basis. While we do not have regular committee meetings, there is frequent communication among members in planning activities.

Due to the closing of the church for services and other activities, the Hospitality Committee did not host any functions this year. Our services have been offered to the Reopening Committee as we transition back into in-person services, meetings, and events.

Even prior to COVID, attendance at social functions was decreasing, including coffee hour, Soup Sunday, and May Breakfast. As church reopens, we will evaluate our role in the context of new initiatives, members' preferences, and needs for social activities, and other factors which may have been impacted due to COVID.

Respectfully submitted,

Mary Sortal

## **Justice Action Ministry**

This year the Justice Action Ministry has sought to continue to serve our Unitarian Universalist principles despite the COVID lockdown. Over the summer we collected food for the immigrant community in Lynn and continued to provide support to the person in sanctuary at the Main Street Church in Amesbury. In the fall we recruited church members to write postcards to encourage people to turn out to vote in the 2020 General Election as well as volunteered to deliver ballots to drop boxes for those unable to do so. At Christmas time we organized parishioners to send Christmas greetings to incarcerated UUs. We ran another food drive for the immigrant community in Lynn in March and in April we created a team for the Louis D. Brown Mother's Day Walk. As the year ends, we will be recruiting delegates for the 2020 General Assembly.

Respectfully submitted,

Ann Maurer

## **Memorial Services Team**

Due to the pandemic and the closure of our church buildings to public gatherings, there were no memorial services held at FRS this church year.

The mission of the Memorial Services Team is to provide the important ministry of supporting families as they plan and hold memorial services at our church. When the church is open for in-person services, Reverend Rebecca and Justin Murphy-Mancini work with each family to plan the worship service. Diane Carroll coordinates logistical details, oversees rental fees, and produces the Order of Service. Congregant members of the Memorial Services Team commit to having two team members serve as liaisons to the families for each service. In this capacity they may help families identify caterers and consider uses of the Parish Hall and Lower Meeting House space. They also identify or serve as ushers at

the memorial service. Most importantly, Memorial Services Team members are a friendly and caring connection to the church throughout the planning process.

Pre-pandemic team members included Linda Buddenhagen, Sherry Evans, Joanna Fernandes, Barbara Garnis, Monique Greilich, Kim Kenly, Florence Mercer, Helen Murgida, and Bettina Turner.

Respectfully submitted,

Diane Carroll, Office Administrator

## **Parish Friends**

Parish Friends remained very active throughout the church year, despite the challenges of physical distancing. Thank you to all who have remained ready to connect and serve.

The Parish Friends network supports our church community members and friends in times of challenge, crises, transition, and special needs. We traditionally deliver meals, provide rides to church functions and medical appointments, write cards to parishioners, perform local errands, provide emergency childcare, and assist with light chores, including occasional pet care.

Ride services were suspended for most of the year. We have recently restored rides, provided by volunteers who are fully vaccinated.

Our focus this past church year reflected the realities of the pandemic. We picked up prescriptions, assisted with grocery shopping, provided meals to households with medical challenges (including COVID), assisted with Zoom and online tools, and connected through phone calls. We also assembled a small team to assist with vaccination appointments. Our card writing team was very active throughout the year.

Two special initiatives worked to strengthen connections with some of our seemingly more isolated members, with surprise deliveries of pies and other treats at Thanksgiving time and cards over the holidays.

Thank you to those who were open to the support offered by Parish Friends, including those who do not typically find themselves relying on “help.” This is a partnership that exists between parishioners, and both parts of that partnership strengthen us.

We have grown again this year, with seven new members expanding our network to over 70 Parish Friends. We look forward to returning to a time of in-person connections, so valued by all of us. We welcome new Parish Friends team members at any time.

We remain available over the summer months and can be reached through the church office or at [parishfriendsfrs@gmail.com](mailto:parishfriendsfrs@gmail.com). The list of Parish Friends team members is current within FRS Connect.

Respectfully submitted,

Susan Ricker, for Parish Friends

## **Program Council**

The Program Council consists of representatives from each of the church committees. The role of the Program Council is to provide a venue for all church groups and committees to share activities, projects and opportunities within our church community as well as provide detailed updates on initiatives impacting the entire church community, such as the Pledge Drive. A representative from each committee is encouraged to attend Program Council meetings to provide updates and to identify opportunities. Meetings are held on the last Tuesday of every other month.

The Program Council met via Zoom three times: in November 2020, as well as January and March 2021. The September 2020 meeting was postponed due to COVID.

The format of the meeting is as follows:

- Chalice lighting and reading by Reverend Rebecca
- Spotlight, focusing in depth on one topic
- Other committee updates, to increase awareness, as well as identify opportunities to coordinate with and request support from other groups
- Questions and suggestions for future topics

Despite the church building being closed to both services and group meetings, interest and engagement in committees remained high. In response to societal needs and issues, as well as the church's closure, several new committees were formed this year, including:

- Anti-Racism Initiative
- Exploring Elderhood Together
- Reopening Committee
- Alternatives to Violence (ATV)

Other committees and ministries represented at the meetings included (some reflect reorganization in church ministries):

- Annual Giving Campaign (Pledge Drive)
- Communications Team
- Community and Human Services
- Congregational and Community Outreach
- Climate Action Project (CAP)
- Faith Formation and Spiritual Exploration
- Finance Committee
- FRS Habitat for Humanity
- Meditation and Guided Relaxation
- Hospitality Committee
- Jazz Vespers
- Journey of Faith
- Justice Action Ministry (JAM)
- Parish Friends
- Pastoral Care
- Reading Groups

- Trustees of the Endowment
- Wilson Music Series
- Worship Associates
- Young Church
- Youth Church

**Spotlight Items included:**

**Annual Giving Campaign – Pledge Drive**

The Pledge Drive took on increased importance due to loss of revenue from the termination of cell tower contract, lack of rental fees, cancellation of fundraisers, and lower Sunday Shared Collection. Members were encouraged to increase 2021-2022 pledges by 15% whenever possible. The church did apply for, and receive, funds through the Paycheck Protection Program (PPE).

**Anti-Racism Initiative**

Inspired by the podcast series “Seeing White” hosted by FRSUU, this group was formed to focus in three areas:

- “Within” the congregation, increasing awareness, attitudes, and training
- “Among” to coordinate with other UU congregations and anti-racist groups
- “Beyond” to engage in initiatives within our community

The group has a strong leadership team and has already been active in several projects.

**Reopening Committee**

This newly formed committee started meeting in September to develop initiatives to keep the congregation connected and engaged while the church was closed, as well as plan for reopening. Some initiatives included:

- Hiring an experienced, part-time multimedia person to produce and promote creative, engaging virtual services
- Opening the sanctuary during certain days/hours for up to 10 individuals or couples
- Planning for summer services

**Passion Action Fair**

For the Passion Action Fair, committees and ministry groups were invited to make a short video, slide, or other presentation to highlight their mission and activities. Presentations were followed by break-out sessions for people to learn more. In addition to educating our congregation on opportunities for engagement, it can also be shared with the community and our website as a recruiting tool. The virtual fair was held on Sunday, March 28 and with approximately 15 participating groups, it was a huge success.

**Exploring Elderhood**

This new endeavor is based on a book and TedTalk by Louise Aronson about embracing elderhood as a new stage of life. Virtual meetings are held once a month, where a topic is presented, followed by discussions in break-out sessions. Subject matter is geared toward those over 60 years old, but all are welcome. Up to 35 people have been attending each month.

## **REALM/FRS Connect**

The Communications Team has been reviewing communication among members and Committees. Currently, communication is done through the Steeple newsletter, Facebook, the website, and REALM/FRS Connect. It was agreed that REALM/FRS Connect is under-utilized, likely because people don't fully understand its function and benefit. Improving and facilitating communication will be a priority in the coming year.

Respectfully submitted,

Annie Maurer and Mary Sortal

## **Short Story Group**

The FRS Short Story Group is a group that meets twice per month for the purpose of reading and discussing short stories.

The stories for this past year come from an anthology titled *The Best American Short Stories of the Century*, edited by John Updike. We began this anthology in April of 2019, after spending over three years with one begun when the group met as Lunch with the Minister.

The stories appear in the order in which they were written, beginning in 1915 and going through 1999, and are by authors both familiar and not. Some of the better-known authors we have read this year include John Cheever, Flannery O'Connor, Philip Roth, Ann Beattie, Tim O'Brien, and John Updike.

The heart of the group is less the reading than it is the discussing. The participants have included people with deep backgrounds in literature as well as many who do not have that. Whatever we bring to the group, we agree we all leave with a deeper understanding of what a given story is about and what there is to glean from it. The discussions often lead to broader conversations about topics raised by the stories; these can include topics such as gender roles, attitudes about race, relationships between parents and children (of all ages!), and how to live in the world.

There are currently approximately 40 people on the email list for the group. A typical meeting prior to the church building closure tended to have 15-18 attendees. We began meeting via Zoom in April of last year with a somewhat-reduced attendance. Most recently we have had a core of about six regular attendees. While this is fewer than it was in person, this group has provided a regular source of connection for all that attend. Along with the reading we also share true tales of what is going on in our lives and in the world.

We will probably complete the stories in the current anthology by the beginning of July and will be choosing a new source of readings. The group is open to anyone interested in participating, whether a member of FRS or not - and they can help us choose our next reading source!

Respectfully submitted,

Tom Himmel

## **Wednesday Night Fellowship**

Due to the pandemic this group did not meet for the 2020-2021 church year.

## **Wizards and Sages**

Due to the pandemic this group did not meet for the 2020-2021 church year.

## **World Religions**

Due to the pandemic this group did not meet for the 2020-2021 church year.

## **Worship Associates**

The Worship Associates for the 2020-2021 church year were:

Jessica Brown

Nancy Crochiere

Kathy Desilets

Vern Ellis

Stephen-Wolf Foster

Kelly Kane

Dawn Pelletier

Marianne Schultz

Ray Wilson

Because of FRS safety protocols during the pandemic, Worship Associates participated in person in only a handful of worship services this year. However, we assisted Reverend Rebecca in evaluating services and provided alternative ways for congregants to connect to one another, including post-service discussions (via Zoom), outdoor gatherings, and walks. A small team led by Vern Ellis will provide opportunities for lay-led worship over the summer months.

Respectfully submitted,

Nancy Crochiere



**ADDENDA**

**Fiscal Year 2021 Financial Projections**

**Fiscal Year 2022 Budget**

			0	1,116	4/22 Bottom Line		
	FY2020 Budget	FY2020 Actual	FY2021 Budget	FY21 Projected	FY22 Proposed	Change	Notes
<b>Ordinary Income/Expense</b>							
Income							
4100 · Contributions							
4103 - Processing Fees Donated		550		1,000		-1,000	
4101 · Pledged	447,000	420,831	450,000	450,000	503,000	53,000	
4102 · Prior Year Pledges	1,000	6,435	3,000	11,646	6,000	-5,646	Incr. based on experience
4106 · Non Pledge	10,000	11,792	10,000	17,000	15,000	-2,000	
4107 · Shared Collection	35,000	36,483	35,000	25,000	25,000	0	
4108 - FRS Recovery Fund Raising		25,723			18,000	18,000	New line for "boost" gifts
4109 · Reserve for Unpaid Pledges	-13,410	0	-13,500	-13,500	-15,090	-1,590	3% estimated
4125 · Steeple Lighting	4,000	3,065	2,500	2,000	2,000	0	
<b>Total 4100 · Contributions</b>	<b>483,590</b>	<b>504,879</b>	<b>487,000</b>	<b>493,146</b>	<b>553,910</b>	<b>60,764</b>	
4135 · Steeple Rentals							
4145 · Verizon	36,504	36,501	0	3,042	0	-3,042	
4155 · AT&T	59,209	56,584	58,458	58,458	60,796	2,338	
<b>Total 4135 · Steeple Rentals</b>	<b>95,713</b>	<b>93,085</b>	<b>58,458</b>	<b>61,500</b>	<b>60,796</b>	<b>-704</b>	
4200 · Fees for Services							
4205 · Child Dedication	1,000	0	1,000	0	1,000	1,000	Assume fees improve with Reopen
4206 · Weddings	3,000	500	3,000	0	3,000	3,000	
4207 · Memorial Services	1,000	350	1,000	500	1,000	500	
4208 · Building Rental	15,500	9,344	15,500	1,000	7,750	6,750	Staff is optimistic rent prospects
<b>Total 4200 · Fees for Services</b>	<b>20,500</b>	<b>10,194</b>	<b>20,500</b>	<b>1,500</b>	<b>12,750</b>	<b>11,250</b>	
4300 · Fundraising Income							
4305 · May Breakfast	300	0	300	0		0	Possibly do in 2022?
4306 · Book Sale	1,200	1,494	0	0		0	Possibly do in 2022?
4307 · Major Fund Raising - Raffle & Au	35,000	350	35,000	33,750	33,750	0	FY21 & 22 both estimated
4308 · Candlelight Service	2,300	3,461	3,400	1,488	2,300	812	
4309 · Rummage Sale	2,000	1,014	2,000	0		0	Possibly do in 2022?

4311 · Yankee Homecoming Fundraisin	1,000	1,000	0	0	0	0	Possibly do in 2022?
Total 4300 · Fundraising Income	41,800	7,319	40,700	35,238	36,050	812	
4400 · Income from Committees						0	
4402 · Hospitality	1,000	796	1,000	1,000	500	-500	
Total 4400 · Income from Committees	1,000	796	1,000	1,000	500	-500	
4500 · Miscellaneous Income		3,552				0	
4500.1 · Previous Year Carryover	0					0	
4500 · Miscellaneous Income - Other	1,000		53,200	72,000	30,000	-42,000	PPP Grant/Income
Total 4500 · Miscellaneous Income	1,000	3,552	53,200	72,000	30,000	-42,000	
<b>Total Income</b>	<b>643,603</b>	<b>619,825</b>	<b>660,858</b>	<b>664,384</b>	<b>694,006</b>	<b>29,622</b>	
Gross Profit	643,603	619,825	660,858	664,384	694,006	29,622	
Expense							
7200 · Salaries & related expenses							
7220 · Salaries & wages - other							
7250 · Payroll taxes	29,127	24,269	29,077	27,919	31,475	3,556	
7265 · Housing Allowance	64,896	64,896	64,896	64,896	64,896	0	
7220 · Salaries & wages - other -	313,850	302,981	315,192	306,122	346,537	40,415	
Total 7220 · Salaries & wages - other	407,873	392,146	409,164	398,937	442,908	43,971	Reflects PB salary recommendations
7240 · Employee benefits						0	
7230 · Retirement contributions	43,711	39,905	46,231	31,401	42,774	11,373	
7240.01 · Health Insurance	20,302	18,043	25,621	22,450	27,166	4,716	Includes 10% plan rate increase
7240.02 · Life Insurance	3,084	2,679	3,193	2,149	3,456	1,307	
7240.03 · Dental Insurance	1,024	1,071	1,132	1,132	1,104	-28	
7240.05 · Workers Comp	2,932	2,848	2,837	3,434	3,053	-381	
7260 · Professional Developmen	16,053	13,705	16,553	16,553	16,484	-69	
7270 · Auto Allowance						0	
Total 7240 · Employee benefits	87,106	78,251	95,566	77,119	94,036	16,918	
7275 · Sabbatical Leave	4,553	4,553	4,553	4,553	4,553	0	
7280 · Salary & Related Exp Savings						0	

Total 7200 · Salaries & related expenses	499,533	474,950	509,284	480,609	541,497	60,889	
7500 · Outside Services						0	
7510 · Fundraising fees		0				0	
7520 · Accounting fees	1,200	1,730	1,560	1,560	1,560	0	
7530 · Legal fees	5,621	5,623	5,621	5,621	5,846	225	
7540 · Professional fees - other	4,750	2,311	6,750	2,000	5,750	3,750	includes \$800 for 501.c.3 fees
7550 · Temporary help - contract	5,050	6,485	5,050	7,378	5,050	-2,328	
<b>Total 7500 · Outside Services</b>	<b>16,621</b>	<b>16,149</b>	<b>18,981</b>	<b>16,559</b>	<b>18,206</b>	<b>1,647</b>	
8100 · Supplies, Comm & Equipment						0	
8110 · Supplies & Materials	11,000	10,471	11,000	5,000	10,000	5,000	Increases to more 'normal' w/ reopen
8130 · Telephone & telecommunication:	6,000	6,495	5,500	7,000	6,500	-500	
8140 · Postage, shipping, delivery	2,000	2,051	2,000	2,000	2,000	0	
8160 · Equip rental & maintenance	8,000	7,402	8,000	4,500	8,000	3,500	
8165 · Computer Expense	4,104	9,894	4,104	4,104	5,000	896	
8170 · Outside Printing & Copying	0	0	0	1,748	1,500	-248	
8180 · Books, Curricula & Subscriptions	0	502	0	0	500	500	
<b>Total 8100 · Supplies, Comm &amp; Equipment</b>	<b>31,104</b>	<b>36,815</b>	<b>30,604</b>	<b>24,352</b>	<b>33,500</b>	<b>9,148</b>	
8200 · Facilities Expenses						0	
8210 · Rent, parking, other occupancy	4,260	4,155	4,760	4,760	4,760	0	
8217 · Repairs and Maintenance						0	
8217.01 · Major Clean-up		566				0	
8217.02 · Furnace	3,000	409	3,000	1,500	13,000	11,500	Plus 12,000 - Bailey help*
8217.03 · Fire Detection	2,000	3,251	2,000	3,234	2,000	-1,234	
8217.05 · Landscape Renewal	1,400	2,226	1,500	4,000	1,500	-2,500	
8217.07 · Roof				5,450		-5,450	Choir roof - offset by Bailey*
8217.08 · Lift Maintenance	2,000	1,972	1,500		1,500	1,500	
8217.09 · Lift Inspection	400	0	0	0	0	0	"Inspection" incl in Maint.
8217 · Repairs and Maintenance	5,750	11,126	5,750	18,448	8,000	-10,448	2021 Steeple work - offset by Bailey*
<b>Total 8217 · Repairs and Maintenance</b>	<b>14,550</b>	<b>19,550</b>	<b>13,750</b>	<b>32,632</b>	<b>26,000</b>	<b>-6,632</b>	
8220 · Utilities							

8216 · Fuel Oil/Natural Gas	10,100	11,420	10,100	8,000	10,100	2,100	
8220.01 · Electricity	8,560	8,399	8,560	6,560	8,560	2,000	
8220.02 · Water & Sewer	2,000	3,438	2,000	2,000	2,000	0	
8220.03 · Propane Gas						0	
Total 8220 · Utilities	20,660	23,257	20,660	16,560	20,660	4,100	
8250 · Mortgage interest	7,200	6,900	6,720	6,458	6,006	-452	
8520 · Building & Liability Insurance	12,850	8,992	13,573	13,573	14,807	1,234	
Total 8200 · Facilities Expenses	59,520	62,854	59,463	73,983	72,233	-1,750	
8300 · Travel & meetings expenses						0	
8320 · Conference, Meeting & Retreat	0	0	2,000	0	500	500	
Total 8300 · Travel & meetings expenses	0	0	2,000	0	500	500	
8500 · Misc expenses						0	
8586 · Commissions & Fees						0	
8505 · Dues and Subscriptions	28,731	29,567	28,731	28,731	30,000	1,269	4.4% increase to ~83% of 36.8k asked.
8510 · Interest expense - general	2,116	722	1,188	0	0	0	
8530 · Membership dues - organization		0				0	
8560 · Outside computer services		150				0	
8570 · Advertising expenses	0	0	0		1,000	1,000	
8580 · Contingency provisions	0	0	0	1,400	1,000	-400	FY21: SL Ordin. FY22 \$1k estimated/
TBD - Reserve provision PPP				53,357		-53,357	PPP Grant Deferral
TBD - Capital Reserve provision				7,000	5,000	-2,000	
8581 · Volunteer Training & Support	1,200	0	1,200	200	0	-200	
8582 · Food & Refreshment	1,200	1,981	1,200	0	600	600	
8585 · - Bank Service Charges	1,200	3,285	2,218	3,585	3,200	-385	
8590 · Other expenses						0	
8590.10 Organ Repair	3,520		3,520	3,520	3,520	0	
8590.9 · Social Action	720	374	720	720	720	0	
8590.8 · Parish Board	720	729	720	720	1,300	580	Stewardship consulting

8590.7 · Raffle	8,000	25	8,000	8,750	8,750	0	Prize + expenses
8590.6 · Worship	1,800	1,659	2,200	1,000	2,200	1,200	
8590.5 · Membership	2,500	765	2,500	1,000	2,500	1,500	
8590.4 · Hospitality	2,700	423	2,700	0	1,200	1,200	
8590.3 · Partner Church Collecti	1,500	1,209	1,500	1,500	1,500	0	
8590.2 · GA & Partner Church St	2,700	750	2,700	1,100	2,700	1,600	
8590.1 · Shared Collection dona	17,500	17,637	17,500	12,500	12,500	0	
8590 - Other Expenses - Other		7,000				0	
8590 · Other expenses	41,660	30,571	42,060	30,810	36,890	6,080	
Total 8590 · Other expenses	41,660	30,571	42,060	30,810	36,890	6,080	
Total 8500 · Misc expenses	76,107	66,276	76,597	125,083	77,690	-47,393	
<b>Total Expense</b>	<b>682,885</b>	<b>657,044</b>	<b>696,928</b>	<b>720,586</b>	<b>743,626</b>	<b>23,040</b>	3.1% increase in Expenses
						0	
<b>Net Ordinary Income</b>	<b>-39,281</b>	<b>-37,219</b>	<b>-36,070</b>	<b>-56,202</b>	<b>-49,620</b>	<b>6,582</b>	
Net Income	-39,281	-37,219	-36,070	-56,202	-49,620	6,582	
						0	
Other Income (Endowment)	52,996	52,996	51,008	51,008	48,044	-2,964	Depends on building fund income for operations, not for capital reserve
				14,050	12,000	-2,050	*FY2021 Bailey Fund income - steeple work 8600 + 5450 roof FY2022 Bailey Fund income furnaces
Other Expense (Capital Reserve contribution)	-7,000	0	-7,000			0	*FY2021 Bailey Fund income - steeple
Other Expense (Mortgage Ppl)	-6,600	-8,413	<b>-7,900</b>	-8,856	-9,308	-452	
<b>Net Operating Cash Flow ("income")</b>	<b>115</b>	<b>7,364</b>	<b>38</b>	<b>0</b>	<b>1,116</b>	<b>1,116</b>	
<b>MEMO LINES:</b>							
Mortgage int and princ combined	-13,800	-15,313	-14,620	-15,314	-15,314		
<b>Operating Cash Flows Summary</b>							
Transfers from Endowment	52,996	52,996					

