

Annual Report

2018 - 2019



The First Unitarian Universalist Society of Middleborough
25 South Main Street
Middleborough, MA 02346

FUUSM – Annual Report

Edited by Bob Waterman

CONTENTS

Ministry

Minister's role and responsibilities

Minister's Overview

Summary of Minister's Activity

Worship

Pastoral/Parish Care

Committee on Ministry

Religious Exploration

Program Notes

RE Committee

Music

Program Notes

Music Committee

Church Life

Small groups

Programming (FUNdraisers)

Membership Development

Hospitality

Public Relations

Social Action

Initiative/projects

Cash in the Plate donations

Religious Exploration Fundraisers

MAAC

Governance/Administration

Parish Committee

Governance/Policy

Leadership Development

Staff Support

Physical Plant/Infrastructure

Building & Grounds

Expansion

Green Sanctuary

Memorial Garden

Technology

Finances

Current Fiscal Year

Investments

"I Love My Church" Initiative

Budget for Fiscal 2017-2018

Appendix – Financial Report for FY 2018-2019

Ministry

Report contributors: Rev. Sarah Person; Sue Curtiss, *Pastoral Care Team Lead*; Bob Waterman, *Committee on Ministry Lead*

Minister's Role and Responsibilities

"The Minister and the Congregation shall share responsibility for the leadership and ministry of the Congregation. Achievement and maintenance of this collaborative relationship likewise shall be shared. The Congregation shall look to the Minister for spiritual leadership and initiative, for assistance in setting and articulating its vision, and for professional and inspired performance and oversight of the Congregation's programs, in collaboration with the Parish Committee and the Congregation's committees."

Minister's Overview

Our membership has grown by six and another eight are regular attendees. We continue to work to create better systems around membership development, hospitality and pastoral care. Our newest programs, Intergenerational Game Nights hosted by Laura and Greg Stevens, and Soulful Sanctuary hosted by Patty and Barry Simon, Andrea Priest and helped by Jeff Stevens, were a great success.

On a sadder note, in the midst of all this growth and activity, we have lost members of our Church family, Judy Moereels (mother of Pam Rocharz), and Victor Dragunas (father of Rob Dragunas).

I continue to be grateful for your energy, willingness to engage, and generosity. I look forward to a great year ahead expanding our membership, pastoral care, hospitality, adult education, and social action initiatives. *Thank you.*

Summary of Minister's Activity

It's best to arrange meetings by calling or emailing ahead rather than dropping in. I have standing meetings and appointments during the week or may be away from the office and I would hate to miss you. Please call the office during hours of operation below (508-947-1935) or my home study (508-967-2763), or email me at minister@uumiddleboro.org if you would like to get together during the week.

Monday	Day off & office closed
Tuesday	9:30 to 2:30
Wednesday	9:30 to 3:00
Thursday	9:30 to 2:30
Friday	9:30 to noon

Church-related Activity: Since my last report to you, I have conducted 33 worship services, and assisted Acting DRE Kelly Lownds with several additional family services. I officiated at four wedding ceremonies and three child dedications, and conducted three memorial services. I meet monthly or semi-monthly with ten committees of the Church. I meet weekly with staff members. I have offered pastoral counseling to 31 individuals.

Denominational Activity: I continue as a member of the Ballou Channing District Board as we wind down to dissolution by merger with the UUA. We anticipate the process will end in the fall of 2019. I serve our district Ministers' Association in two capacities; Vice-president and Good Officer. I am one of twenty or so Peer Facilitators for the New England Region. In this capacity, I meet at least twice a year with other UU congregational boards to facilitate visioning and planning discussions.

Community Outreach: I am serving as a Recording Secretary for the Middleborough Area Assistance Coalition (MAAC). I was appointed to the Middleborough Affordable Housing Committee by the Middleborough Board of Selectman. I am serving my third year as a Board member of the Old Colony YMCA.

Discretionary Fund Activity: The Minister's Discretionary fund does help church friends and members, but primarily helps individuals in our surrounding communities with emergency situations. This fund is supported by the Scott Trust, Sunday Cash-in-the-Plate collections a couple of times a year, and my contributions of fees collected for dedications, weddings, and memorial services. I work with our Care Teams, the Salvation Army, St. Vincent de Paul Food Pantry, Middleborough Gas and Electric, Middleborough Public Schools, and our Veterans Agent in town to offer emergency assistance to individuals and families experiencing financial crises. This year we helped with rent, utilities, gas, food, shelter, and a chair for a disabled child. Among others, we helped a couple who were burned out of their apartment, people who had lost their jobs, mothers and fathers who could not work due to their own illnesses or caring for seriously ill children, and adult children caring for elderly parents. *Thank you for your generosity. You have made a real difference in their lives at a time when they needed it most.*

Veterans Ceremonies: I have offered invocations and benedictions at our annual town-wide Memorial Day and Veterans Day services.

Worship

Our worship theme for the year was "Covenant." Covenant explored the promise and commitment to working out our differences in the context of the relationships we build together. It was a natural follow-up to the previous year in which we dealt with the social and political upheavals of our times. The issues have been reflected in sermons and small group discussions.

The Worship Team, consisting of Greg Stevens, Jim Norris, Frank Girard, Tanya Trzeciak, and Rev. Sarah Person, met infrequently this year. We hope to reinvigorate our team with a clearer mandate.

Pastoral/Parish Care

Our Care Teams are an extension of the Minister's pastoral care presence. The goal is to maintain a sustained connection between congregants and the Church, especially when church attendance becomes difficult or impossible, and to provide a structure for responding to the emergencies that affect the Congregation. This connection is maintained through phone calls, visits, and supportive activities offered by team members.

Our teams have been busy offering counseling and practical support to many of us over the course of the year. Lay pastoral care providers include: Sue Curtiss (Lay Pastoral Care Minister); Bill Howe, Kim Correia, and Sue St. Germain (Advisors and Friendly Visitors); Dody Adkins Perry & Juli Gould (Meal Coordinators); Tricia Tummino (Transportation Coordinator); Chris Korben (Card Ministry);

Valerie Fontaine (Caring Choir Coordinator); Juli Gould (Knitting Ministry Coordinator). With Chris Korben's move to Tennessee, the role of Card Ministry Coordinator is now open.

In addition to providing assistance, teams members began our "Remembership" program; calling on members and friends a couple of times a year just to say hello and give people an opportunity to offer feedback.

Committee on Ministry

The Committee on Ministry consists of Bob Waterman (Lead) and Rev. Sarah. The Committee's purpose is to help strengthen ministry in our Church. The Committee operates on the principle that while it is the job of the professional minister to provide leadership and perform in a specialized role, overall ministry belongs to the membership of the Church as a whole. Ministry, therefore, refers to all activities that carry out the Church's mission. Accordingly, the Committee serves two main purposes: (1) To serve as a conduit for information and feedback concerning the effectiveness of ministry in our Church; the Committee seeks out and is open to input from the Congregation. (2) To serve as a sounding board and support resource for the minister. The Committee met over the course of the Church year, discussing and processing feedback from the Congregation and providing support and feedback to the Minister.

Religious Exploration

Report contributors: Kelly Lownds, *Acting Director of Religious Exploration*; Christine Hoyle, *Religious Exploration Committee Chair*

Events

- Annual Halloween Bonfire/Party was held in the Parish Hall due to inclement weather, hosted by the RE committee. Included games, pizza, and candy.
- Annual Holiday party was held in the Parish Hall and included gingerbread decorating, ornament making, story-telling, pizza, and dessert.

Theme

Our theme this year was Quest for the rings. We celebrated the six sources:

- Jewish traditions (September)
- Christian traditions (October/November)
- Earth Centered traditions (December)
- Islam (January/February)
- Science and Reason (March/April)
- Mystery and Wonder (May/June)

We collected rings for each of the quests for the six sources: Mystery and Wonder, Words and Deeds of Prophetic People, Wisdom from World Religions, Jewish and Christian teachings, Humanist Teachings and Earth Centered traditions.

Classes and Attendance

This year we had the nursery and the main classroom. We started all but the babies and toddlers for gathering time and then gave the main classroom children options to choose activities based on their interest/age. The offerings included: Research space for the teens, Creation space, Contemplation space, and Questing space.

	<u>2018/19</u>	<u>2017/18</u>	<u>2016/17</u>	<u>2015/16</u>	<u>2014/15</u>
<u>Average Attendance</u>	11	18	19	16	13
<u>Highest Attendance</u>	26	26	34	22	19
<u>Lowest Attendance</u>	2	9	11	8	7
<u>Number of Teachers</u>	23	27	28	28	29

Of the 23 teachers, 16 did not have children in the program. We could not make RE happen without the efforts of all our adult leaders and helpers. We were immensely grateful for all the teachers and volunteers who helped us this year. We also appreciate every adult who has taken a moment to have a kind word with a child in our program or spent time helping with our stories and our classes.

Worship

Religious Exploration led three services this year:

- The Wheel of the Year
- A Wrinkle in Time
- The Youth Service

Service Projects/Fundraising

The Senior youth group sold popcorn and hot chocolate at the Middleboro tree lighting ceremony, and popcorn and juice at the Lakeville Arts Festival. The group also managed coffee hour once a month – 12/20, 2/3, 3/31, 4/28, 5/12, 6/9.

Senior Youth

This year Greg Stevens and Kelly Lownds led Senior Youth Group meetings twice a month starting in November. The group had six youth, five of whom attended regularly. We met and completed the Virtue of Ethics curriculum together and talked about decision making, moderation, integrity, respect, fairness, responsibility, compassion, humility, generosity, courage, forgiveness, and loyalty. We shared pizza each at each meeting and we will have an outing to conclude the year.

Childcare

Ashley Andrade and Alex Pucillo-Dunphy provided child care. Hope Lownds and Brynn Stevens substituted, as needed.

RE Committee

Christine Hoyle chaired the committee, she, Nancy Kidd, Greg Stevens, and Kim Correia started off the year managing the RE curriculum and the teacher planning. They were a huge amount of support for the RE program. Maria Pucillo-Dunphy continued to act as our CORI administrator.

Next year

Our preliminary theme is related to the environment and the exploration of nature with the children. We will try to support the efforts of the Sustaining Middleboro group in addition to our own learning.

We will try offering a Junior youth group (grades 6-8 grade) every other week during church on Sundays and will continue to offer Senior youth group (grades 9-12) at least one time per month on Sunday evenings.

Adult Education

Thanks to you, we have offered a rich opportunity for thoughtful reflection this past year.

- No Such Thing as a Bad Kid by Charles Appelstein was offered this year for parents. There were several church members who attended this program that speaks to the need to hold children in high regard and work to be consistent in caring in interacting with our children. This will be offered again in the upcoming year and may be offered to the wider community.
- Building Your Own Theology was led by Vi Fairweather and Bob Waterman. This will be continued next year.
- Living In the Questions was led by Dan Hotchkiss. This will be continued next year.

Music

Report contributors: Susan Hotchkiss, *Director of Music*; Valerie Fontaine, *Music Committee Chair*

Music Life

UU Middleboro continues to keep up a steady and vibrant beat. We have more participants than ever, each person bringing a unique sound into the mix. The choir rehearses on Tuesday evenings, and sings for worship on alternate Sundays. “Non-Choir Sundays” feature instrumentalists and various configurations of singers, mostly from the choir. The full active roster for Chalice Choir has hit 27, including two new members. We continue to attract musicians looking for a strong music community who often become church members and foundational participants in our congregation.

Special Worship Services

Christmas Eve was once again a high point, featuring the Chalice Choir along with ensembles and soloists, Shelley Otis (harp), and Fabio Pirozzolo (percussion). On January 6, Capriol Consort provided all the music on a variety of recorders and other early instruments. Jazz Sunday this year was on February 23, with Jeannie Gagné and Stan Strickland. On March 31, Starry Night Band played for the last time before one of their members moved to Wales. Music Sunday took place on May 5th with the choir singing “Like Dust We Rise” – a four anthem song cycle based on the poetry of Maya Angelou, set by Mark Hayes. In addition to the choir, the instrumentalists included Ruth Lampietro, Nancy Kidd, Patty Simon, Owen Kidd, Adrienne Williams, and Eddie Kidd. This year, the church started a new music-rich alternate worship experience called “Soulful Sanctuary” with supper and reflective music and readings on alternate “Fourth Fridays.”

Concerts

The fifth and final “Raising the Rafters” concert took place November 4th, featuring organ historians and performers Permelia and David Sears. This concert was to celebrate the refurbishment of our 1890 Woodberry & Harris Tracker Organ and to thank the Town of Middleborough and Community Preservation Committee for partial funding. The Chalice Choir participated in the annual Middleborough Music Guild Thanksgiving Concert at Sacred Heart Church on November 16th. A large Caring Choir sang at the Town Hall Holiday Lighting Ceremony on December first and also presented a Sing Along Holiday Concert on December 9 at Newfield House in Plymouth. On April 27, Andrea Priest directed “Men Who Cook, Women Who Sing” which was a major fundraiser for the church. On June 2, we enjoyed Erik Lindgren and The Bespoke Consort as a season finale.

Workshops

Part of “Building a Musical Community” is offering education to music participants. On August 28, Elizabeth Norton from First Parish Concord offered a vocal workshop. On February 10, Lisa Esperson from Falmouth offered “An Introduction to Middle-Eastern Rhythms & Drums.” Both workshops offered fresh information and were well attended by church members and friends.

Caring Choir

This group, led by Valerie Fontaine, may become more active as “Friendly Singers.”

Piano Acquisition

Our old 1906 Baldwin Grand had reached a point where it needed major refurbishment, and after gathering appraisals in the fall and fund raising in January & February, we found and purchased a new Mason & Hamlin Model B (baby grand) for the church. The piano was delivered in April and tuned up in time for Men Who Cook and Music Sunday.

Music Committee

This small dedicated group, led by Valerie Fontaine as Chair, meets monthly and is always looking at ways to refine and support the music program. Some current issues include changing the approach from a “committee” to a “team” in order to have more flexibility and vitality.

KUDOS TO OUR AMAZING MUSICIANS: Dody Adkins-Perry, Katie Allen, Nancy Backus, Marese Barry-Belanger, Holly Begley, Mark Belanger, Cindy Benard, Rick Benard, Jim Bonnar, Susan Curtiss, Rob Dragunas, Valerie Fontaine, Kimberly French, Dan Hotchkiss, Jon Keene, Edward Kidd, Nancy Kidd, Owen Kidd, Heidi Lawton-McCarthy, Dorine Levasseur, Marc MacQueen, Mal Marvill, Joshua McKiernan, John Mullen, Andrea Priest, Ed Priest, Bill Sherman, Barry Simon, Patty Simon, Tony Soares, Jeff Stevens, Bryn Stevens, Laura Stevens, Linda Thompson, Nicola Wilbar, Adrienne Williams, Heidi Woofenden.

Church Life

Report contributors: Bob Waterman, *President*, Andrea Priest, *Fundraising Programs Coordinator*; Dorine Levasseur, *Membership Development Team Lead*, Rev. Sarah Person

Ours is vibrant community always busy with many activities and events. The hard work and dedication of many committed and talented individuals help makes these a success.

Small Groups

We have several small groups that met regularly over the year:

- The Spirituality Group, led by Bob Waterman, provides a safe, quiet space to explore personal spirituality, learn more about teachings and practices from a variety of traditions, and share life's journey with fellow travelers.
- Satsang, led by Valerie Fontaine, is centered on passage meditation.
- Sangha Meditation, led by Tom Tanguay, provides an opportunity to develop a deeper meditation practice.
- A Healing Circle, offered by a few of our members and friends who are Reiki practitioners, offers a way to take a step back from the chaos of modern life and to retreat, relax, and allow yourself to just "be."
- A book discussion group, led by Carleen Loper, provides a wide array of thought-provoking material and interesting conversations.

Special Offerings

We had several community-building and enrichment offerings over the year:

- Launched as one of our "Finale Fridays" offerings, Soulful Sanctuary was offered the last Friday of every other month and provided food for the soul with dinner, music, and readings. It was organized by Patty and Barry Simon with assistance of Andrea Priest, Susan Hotchkiss, and Rev. Sarah Person.
- The other "Finale Fridays" offering was Intergenerational Game Night, offered the last Fridays of alternating months by Greg and Laura Stevens and provided opportunities for churchgoers of all ages to enjoy games and pizza.
- Words Matter, led by Carleen Loper, Sandy Smiley, and Rev. Sarah Person was a blend of video presentations, readings, and reflection on the complexity of race and society. The program explored how we may play a role in both the problems and the solutions.

FUNdraising Programs

Our fundraising programs continued to be not only a source of funds, but also a wonderful addition to our Church life. It is good for us to create fundraisers to support the work of the Church. We have fun and create good memories. In particular, there are many service auction events planned throughout the year to help keep us connected. However, some of our events are quite labor intensive and perhaps we should re-evaluate which are best to continue, from a cost/benefit standpoint.

In August, we held our annual Yard Sale, in conjunction with the Street Festival, Krazy Days. The sale was very successful thanks to the leadership of Sue Sherman and the hard work of many others. It is a huge effort to get everything sorted and ready. It was a great opportunity to recycle, reuse, and raise some money. Items are not all priced; buyers make an offer, which reduces the amount of time pricing all the items. The festival brings many people to the downtown area so it is a great time to have a fundraiser that takes advantage of such a large audience.

In October, we participated again in the Lakeville Arts Festival by providing a food stand where we sell soup, bread, chicken salad, meatball subs, homemade goodies, and cranberries donated by Helen Casoli. It is quite a task to organize and takes many hands to implement, and our team of three leaders – Eileen Smith, Nancy Backus, and Juli Gould, pulled it all together. The Senior Youth also sold popcorn and juice. It's always a good fundraiser and a great way to be present in the community, even with unpredictable factors, such as warmer weather impacting soup sales, that have an impact on the final results. We sold leftover goods at church on Sunday and had good results.

In November, the Senior Youth sold popcorn and hot chocolate at the Middleboro tree lighting ceremony.

In March, Norm Grenier continued the tradition as auctioneer for the annual "Service Auction". The best part, of course, are all the opportunities to get together for all kinds of activities all throughout the year.

In May, Men Who Cook, Women Who Sing was a terrific success celebrating its 14th year raising more money than any other year! There were over 25 performers in addition to the full choir. Over 11 "Men Who Cook" participated and did a great job. In addition, there were more than 30 people involved in preparing other appetizers, setting up, working the kitchen, and cleaning up. It was a great night!

In May, the annual Plant Sale, once again coordinated by Mike Schroeder and Maria Pucillo Dunphy, was held and was a great success.

See the Finance section for details on the financial results of our fundraising efforts.

Membership Development

The Membership Development Team, consisting of members Dorine Levasseur (Lead), Chris Korben, Susie Sherman, and Rev. Sarah, (and joined very recently and happily by Dave Kraemer and Cheryl MacQueen) continued its work this Church year to enhance the welcoming nature of our community by elevating the profile of its outreach to visitors and new members, both by consistent and continuous follow-up and connection. We continued our Newcomer Muncheons (light lunch following a Sunday service), holding them twice a year and have had good feedback from participants. We use this time to give newcomers an opportunity to share what brought them to FUUSM and to learn about their interests and what they are looking for in a spiritual community. They also have a chance to learn about us, the life, work, and activities of our community, and what keeps us going. Through these conversations, both at the Muncheons and through one-to-one contact, and by deliberate and planned follow-up with newcomers, we hope to connect people with our community in a way that builds ongoing relationships. We were successful in developing a solid Welcoming Team, people who at each service focus specifically on newcomers, wear lovely stoles made for us by Linda Thompson, and connect our visitors with church members. We are grateful for their contributions to this important work.

As a team, we have begun looking at broader Church policies and procedures of building membership. Through a brainstorming process in which a small cross section of members participated, we developed recommendations to the Parish Committee specifically around the Membership Book, its visibility, practices around signing the book, what it means, how we approach this with those who are interested in joining us.

In the new Church year, we hope to have more comprehensive information on our website regarding paths to membership, a “Becoming a Member Packet”, and a two-session “orientation” that would follow each of the Newcomer Munchcons in the fall and in the spring. The content of these sessions is being developed and will be open to newcomers and current Congregation members as well. In addition, we will both work on ideas to solidify our membership and continue to explore and expand on opportunities for increasing our presence in the broader community, always mindful of our capacity. Finally, we intend to be mindful of the offerings of the UUA New England Region in terms of resources, workshops and webinars that can be helpful in the growth and ongoing development of our members and our congregation.

Sadly, we are losing Chris Korben to a new life in Tennessee and we are grateful to her for all the wonderful work and energy she has brought to our team. We wish her and Pam Davis the very best in their new adventures.

Hospitality

The Hospitality Team continued to organize coverage for Sunday Coffee Hour and members contributed to other events at the Church. Contributors included Andrea Priest, Dody Adkins Perry, Eileen Smith, Sue Sherman, Sandy Smiley, Bill Howe, Rev. Sarah Person, and many others who provided treats, helped with set up, washed dishes. etc. It has continued to be a challenge to recruit volunteers for this effort.

Public Relations

The Public Relations Team continued to spread the good word about all of the wonderful things our Church has to offer. Contributors included Mark Belanger, Pam Davis, Maria Pucillo-Dunphy, JR Pucillo-Dunphy, Valarie Ortelt, and Rev. Sarah.

The team seeks to get information in a timely fashion to as many people as possible in as many ways as possible, and works with the various committees and teams to facilitate and coordinate information flow. Avenues include our website, social media sites, email updates/alerts (UU Updates, E-tree), features in local newspapers, and specialized brochures.

Everyone has a part in helping spread good PR about our Church. The easiest way is to interact through the Church’s social media sites. You can comment on posts, and share them with family, friends, or to a broader audience.

Like us on Facebook:	www.facebook.com/uumiddleboro
Follow us on Twitter:	@UUMiddleboro www.twitter.com/UUMiddleboro
Subscribe to us on YouTube:	www.youtube.com/user/UUMiddleboro
Watch us on local cable TV:	https://www.middleborough.com/213/MCCAM and enter ‘Unitarian’

Social Action/Social Justice

Report contributors: Cheryl MacQueen, *MAAC Representative*, Kimberly French, *Climate Justice Initiative Team Lead*, Kelly Lownds, *Acting Director of Religious Exploration*, Rev. Sarah Person

Social Action/Social Justice is widely viewed by this Congregation as an opportunity to deepen our commitment to our faith by acting on the principles we profess. In so doing, we strengthen our connections to one another, and engage our children and newcomers in the meaning of being a UU in the world.

Projects/Initiatives

Rev. Sarah remained involved in various community organizations and activities, and served on a number of local boards. She helped individuals in our surrounding communities with funds from the Minister's Discretionary Fund, and she worked with local agencies to offer emergency assistance to individuals and families experiencing financial crises.

The Church supported the Food Pantry of St. Vincent de Paul. Evelyn Buczek transported our donations to the Food Pantry this year. *Please donate as generously and as often as you can.*

MAAC

The Middleboro Area Assistance Coalition's (MAAC) is an area wide coalition that represents agencies and organizations dealing directly or indirectly with conditions that are detrimental to the health, safety, or social well-being of individuals and/or families in the service area. UU Middleboro has been involved almost since its inception. This year, Cheryl MacQueen served as Vice Chair and the Church's representative to the group, and Rev. Sarah was the Recording Secretary this year. Cheryl and Rev. Sarah attended regular meetings and reported back to the Church on the group's initiatives and projects.

Climate Justice

In early 2017, 27 adults in our Church demonstrated their commitment to taking action for a livable climate by signing up for an intensive 5-session Exploring the Web of Life course. This led to a robust initiative led by Kimberly French that this year evolved into the launching of the community-based group Sustainable Middleborough. One of the group's major initiatives was to run a robust campaign for Middleborough Gas & Electric Commissioner. At a recent statewide conference, Kimberly was asked to say a few words about the group's startup, and she described it as "on fire", as there has been much activity this year.

Cash in the Plate Donations

Each month, we donate our “cash in the plate”, i.e., any cash not designated toward pledges, to local worthy causes. Thanks to everyone for your incredible generosity!

Recipients	Amount
Minister’s Discretionary Fund	\$4794.50
Black Lives Matter	\$880
Food Pantry	\$886
Conway House	1,035
Foster Care	\$617
Fuel Assistance	\$698
Hurricane Relief	\$899
Turning Point	\$511
YMCA	\$755
Total (so far!)	\$11,055.50

Governance/Administration

Report contributors: Bob Waterman, *President, Governance & Policy Team Lead, Leadership Development Team Lead, Staff Support Team Lead*

Parish Committee

The Parish Committee worked continuously this year to address many issues from mundane to more significant to the life and future of our Church. At the start of the Church year, the PC revisited the vision for the Church developed last year. The vision addressed three components: (1) Engaging with the community beyond our walls; (2) Building spiritual community in our Congregation; (3) Paying our way responsibly.

Listening circles were held in the winter, organized by Eileen Smith. These were well-attended, well-received, and provided valuable feedback and engagement.

The design and planning for our Annual Pledge Drive was a substantial project. Greg and Laura Stevens led a task group to contact pledge units; thanks go to Marc MacQueen, Dan Hothkiss, Rick Benard, Cindy Benard, Jim Bonnar, Gene Phillips, Andrea Priest, Bill Howe, Holly Begley, and Rev. Sarah Person their hard work and commitment to the effort.

FUUSM became a 501(c)3 non-profit, thanks primarily to Bill Howe's considerable efforts. Thanks also go to Dan Hotchkiss, Rev. Sarah, and others who worked on the application.

Over the year, the PC also addressed the development and revision of several policies and procedural guidelines.

Governance/Policy

The Governance/Policy Task Group, comprised of Bob Waterman (Lead) and Rev. Sarah, serves to: (1) Examine current governance and management structures and methods, and make recommendations on revised or new approaches; (2) Draft and facilitate implementation of changes to Church by-laws; (3) Create, review, and revise policies as needed; (4) Design mechanisms for effective communication of policies (e.g., Policy Handbook, postings on website).

Key projects included: (1) Continuing to examine policy governance models and alternate organizational structures; (2) Continuing to develop a comprehensive Finance Policy; (3) Developing revisions to the By-laws that were adopted at a Special Congregational Meeting in April.

Thanks go to the committees, teams, and individuals who assisted with review and revision of the above.

Leadership Development

The Leadership Development Team consists of Bob Waterman (Lead), Barbara Bancroft, Chris Korben, Norm Grenier, and Rev. Sarah. The team's purpose is to help cultivate of leadership in the Congregation. Specific objectives include: (1) Helping define and establish the mission and vision of leadership in the Church; (2) Assessing needs for leadership development opportunities; (3) Developing

and delivering leadership development activities, such as training, retreats, and meetings for Church leaders; this may include identifying outside activities at the regional level, UUA, or other sources, and identifying resources to provide activities in-house; (4) Assisting with seeking out and identifying individuals in the Congregation who have the skills, abilities, experience, and willingness to serve in leadership positions on committees, teams, and task groups.

This year, the team: (1) Continued to examine the Church's leadership mission and vision, and identified specific developmental needs for the enhancement of leadership skills; (2) Coordinated the Nominating process and sought out candidates for Parish Committee positions for the upcoming year.; (3) Assisted in identifying potential leaders for other key roles.

Staff Support

The Staff Support Team, consisting of Bob Waterman (Lead) and Marc MacQueen, provides support to the Church's professional staff and to the Minister, as staff supervisor. This year, the team: (1) Assisted with the hiring of the Acting Director of Religious Exploration; (2) Examined staff compensation and benefits issues, and made recommendations for staff salary increases for next year's budget.

Physical Plant/Infrastructure

Report contributors: Susie Sherman, *Building & Grounds Team Lead*; Rev. Sarah Person.

It takes many hands to keep our Church in good working order. Our glorious old building and surrounding grounds continue to delight, but also present many challenges to keep things presentable and functioning properly. Many thanks go to all those who work tirelessly to see after this very important work.

Building & Grounds

Susie Sherman continued to lead the efforts to oversee the work of maintaining the building and grounds. She notes that there a number of individuals who contribute to this work, and the regular contributors are Alan Melchior, Marc Mac Queen, JR Pucillo-Dunphy, and Bill Sherman. Susie does a good bit of hands-on work, as well. Steve Page, our Sexton, also contributes to our general upkeep in addition to his regular maintenance duties. The summary below captures only some of the major work that was done during the year.

Upkeep and maintenance:

- Susie, Bill, and Steve replaced the Parish Hall filters three times.
- The filters in the Sanctuary (there are four) are still not dirty and we hope to seek and upgrade to the filtering of air into the sanctuary.
- Roberts Roofing replaced a few shingles and cleaned the gutter over the Nickerson Ave. door.
- The batteries in the lights on the back stairs were replaced four times.
- Parlor lights were replaced with LEDs.
- Steve continues to handle pest control.
- Veterans Lawn Service continues to do lawn mowing.
- Tulip bulbs were planted last fall by volunteers.
- Susie removed the Nickerson Ave. facing ivy from the stone foundation.

In the works:

- Robert's roofing will do 1/3 more of the roof: 1. Final part of the parlor, 2. Driveway entry and organ addition roofs.
- Alan produced an RFP and Susie and Alan are interviewing contractors for paint work and repairs to trim of the exterior. Paul Macuch of Macuch Restoration and Painting and Murphy Painting and Power Washing submitted bids for Portico, water-table, and 1st, 2nd and 3rd floor painting and repair of trim.

Elevator Inspection - The state inspection of our elevator was done December 10, 2018. According to current regulations, inspections must be done every two years, meaning our next inspection needs to be done on or before December 10, 2020. Above and Beyond Elevator technicians must do the pre-inspection maintenance one month before the inspection.

Expansion

The Expansion Task Group, consisting of Pam Davis, JR Pucillo-Dunphy, Alan Melchior, Sue Sherman, Jim Bonnar, and Rev. Sarah, met with architect Eric Kluz and explored long-term possibilities for building an addition.

Green Sanctuary

Though inactive this year, the Green Sanctuary Team still serves to advocate for engaging in environmentally responsible and sustainable practices in all that we do, including purchase and use of goods and materials, energy conservation, and recycling.

Memorial Garden

The Memorial Garden Team, led by Mike Schroeder, oversees maintenance and care of the Memorial Garden, which is the repository for ashes of former members of our Church. The Garden is a place of contemplation and remembrance, and many hands have contributed to its upkeep and beautiful presentation.

Technology

The Technology Team keeps our technical systems and equipment in working order, maintains our Church website, social media accounts, and email addresses, and records and distributes for broadcast our Church services. Contributors include JR Pucillo-Dunphy, Maria Pucillo-Dunphy, Rob Dragunas, Mark Belanger, Valarie Ortelt, and Rev. Sarah.

Finances

Report contributors: Marc MacQueen, *Treasurer*; Bill Howe, *Investments Team Lead*; Andrea Priest, *Fundraising Programs Coordinator*; Bob Waterman, *President*

Current Fiscal Year

Pledge units have been very committed to paying their pledges this year. About 97% of budgeted revenue will be collected. A significant portion of our income comes from the fundraising programs that so many of our members work tirelessly to help make succeed. We will come close to meeting our fundraising goal. Thank you to all the volunteers who made the fundraising so successful! Rentals and unpledged special gifts are more than budgeted. Overall, this year's revenue is expected to be \$2000 more than budgeted.

Almost all expenses are under budget.

Thus, the anticipated budget deficit for the current fiscal year will be approximately \$11,000 instead of the budgeted \$13,000 (see particulars in pages following this report).

Funds in Checking Accounts

Account	Fund	Balance as of 5/18/18
Church Debit card	Operations-Unrestricted	\$2,824
Church Operations	CUUPS	\$864
Church Operations	Cash in Plate [^]	\$517
Church Operations	I Love My Church*	\$12,875
Church Operations	Piano*	\$650
Church Operations	Petty Cash	\$594
Church Operations	Pre-paid Pledges	\$4,380
Church Operations	Operations-Unrestricted	\$20,211
Total		\$43,915

[^] Pending check disbursement to recipients.

* Funds to be moved to Investment accounts as soon as our Fidelity Account is changed to a Corporation account.

Investments

The Church has several investment funds, some that are restricted, and one general fund that is unrestricted. The Investments Team, consisting of Bill Howe, Marc MacQueen, Gene Phillips, and Alan Melchior, oversees the investment strategy for the managed funds. The funds have not done as well as we had hoped this year; our overall rate of return was approximately 3%. This is primarily due to market losses in the period November 2018 to February 2019.

The transition of our investment accounts due to our new incorporation status should finally be complete when Fidelity gets the account changed over to a corporate account.

Fund	Balance on 7/1/18	Market Change	Balance on 4/30/19
Unrestricted	\$105,639.15	\$8,477.72	\$104,930.40
Scott Trust	\$18,629.08	\$1,494.32	\$19,914.97
Mary Fuller	\$23,714.64	\$1,902.26	\$26,336.55
Organ	\$953.65	\$76.50	\$1,059.09
Piano	\$301.23	\$24.16	\$949.33
Memorial Garden	\$1,086.16	\$87.13	\$1,173.29
Total Funds	\$150,323.91	\$12,062.09	\$153,447.26

Budget for Fiscal 2019-2020

In 2018, the Parish Committee set forth a vision for the Congregation. One element was that we focus on paying our way more responsibly, and the PC set a goal of eliminating deficit spending by FY 2019-2020. In order to achieve this, the goal for this year's Pledge Drive was to increase overall pledges by 20%. We hoped to fully fund our quality programming and continue the trajectory of growth that we've been aiming for in the last few years. A key objective has been to continue moving toward Fair Compensation for our top-notch staff. We also for the first time asked pledge units to include in their pledge a contribution to the UUA's Annual Program Fund Drive. FUUSM has supported the UUA with an annual contribution for many years and for over 30 years has achieved Honor Congregation status, meaning we have contributed the Fair Share amount requested by the UUA each year.

To date, the Pledge Drive has resulted in new pledges and increases to pledges totaling nearly \$19,000. However, as it happens in some years, we've also lost some significant pledges and some have reduced their pledges, yielding a net increase of approximately \$7,000. This means we have some tough choices to make. After much consideration and deliberation, the PC is recommending the following:

- Reducing our contribution to the UUA.
- Reconfiguring and reducing the DRE position. The PC is endorsing the RE Committee's recommendation to create a separate Youth Advisor position to support the DRE. The PC is also recommending that the DRE position be reduced to 3/8 time.
- Providing modest salary increases for other staff, which will help continue moving them toward Fair Compensation Guidelines, though will not get them to the level we would like them to be.

This will still leave us with a budget deficit of approximately half of last year's. Though we will not achieve our goal of eliminating the deficit for the next fiscal year, we will continue to work on achieving this goal for the following year.

APPENDIX

**FIRST UNITARIAN UNIVERSALIST SOCIETY OF MIDDLEBOROUGH
FY 2018/2019 Projected End of Year Financial Report**

	<u>2018/2019 Budget</u>	<u>YTD As of 4/30/19</u>	<u>May-June 2019 Projected</u>	<u>2018/2019 Projected</u>	<u>2018/2019 % of Budgeted</u>
<u>Revenue</u>					
Pledges	\$150,000	\$126,369	\$20,131	\$146,500	98%
Fund Raisers	\$21,000	\$14,870	\$1,300	\$16,170	77%
Investments & Dividends	\$15,400	\$13,760	\$ -	\$13,760	89%
Rental Income	\$4,000	\$2,984	\$400 -	\$3,384	85%
Other	\$6,541	\$1,430	\$-	\$4,760	105%
Total Revenue	\$196,941	\$159,413	\$21,831	\$181,244	92%
<u>Expenses</u>					
<u>Operations Expenses</u>					
Compensation (Staff & Guest Speakers & Musicians)	\$166,883	\$134,295	\$21,600	\$155,895	94.6%
Administration (Office & Communication)	\$10,145	\$7,085	\$3,400	\$10,485	98.7%
Committees (including Music and LifeSpan Exploration/RE)	\$11,736	\$4,483	\$250	\$4,733	40.3%
Buildings&Grounds&Utilities	\$5,965	\$4,510	\$900	\$5,410	90.6%
Total Operations Expenses	\$194,729	\$150,373	\$26,150	\$176,523	90.7%

We had projected taking approximately \$12,000 to balance our budget, and to date we have withdrawn a total of \$10,750. Our income (including the withdrawal from investments) has exceeded our expenses. May it continue.