

First Congregational Society, Unitarian
Chelmsford, MA 01824

STATE OF THE SOCIETY MEETING

October 18, 2026



Link and connect info for the SoS meeting:

<https://www.uuchelmsford.org/congregational-meeting/>

Join Meeting: <http://meet.google.com/xwv-mmwf-ovt>

Or dial: (US) +1 209-425-2198 PIN: 817 423 032#

Topic: First Parish State of the Society Meeting

Time: October 18, 2026 11:30 AM Eastern Time (US and Canada)

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WARRANT

The State of the Society Meeting of the First Congregational Society (Unitarian) will be held on **Sunday, October 18, 2026 at 11:30AM** in person and via Google Meet to act on the following articles:

ARTICLE I.	To elect a moderator (Sanctuary) & assistant moderator (Google Meet)
ARTICLE II.	To vote on the admission of new members. Dan Wilson Mary Hart
ARTICLE III.	To vote to accept the Minutes of the Annual Meeting held June 14, 2026
ARTICLE IV.	To vote to accept the Auditor's Report for FY2026
ARTICLE V.	To vote to accept the Treasurer's Report for FY2026
ARTICLE VI.	To vote to accept the Collector's Report for FY2026
ARTICLE VII.	To vote to accept the Board of Investment Report for FY2026
ARTICLE VIII.	Update on Audio Visual plans for the sanctuary. No vote will be taken.
ARTICLE IX.	To open discussion to any issues of concern to the members. No vote will be taken.
ARTICLE X.	To vote to adjourn.

A True Copy Attest



Colleen Leary, Clerk

Draft Minutes from Annual Meeting Held June 14, 2026

Minutes of the June 14, 2026 Annual Meeting of the First Congregational Society, Unitarian

Absentee Ballots: 10 collected in person on the day of the meeting, 2 collected online.

All voted yes to each article.

The Annual Meeting of the First Congregational Society (Unitarian) will be held on Sunday, June 14, 2026 at 11:30 AM in person (and online) to act on the following articles:

ARTICLE I.	To elect a Moderator (pulpit) and an Assistant Moderator (online). Motioned by John Schneider to nominate Joan Coyne for Moderator Seconded by Beth Benoit Vote: Unanimous Motioned by John Schneider to elect Neal Harmon as Assistant Moderator Seconded by Beth Benoit Vote: Unanimous
ARTICLE II.	To vote to accept the Minutes of the Congregational Meeting held on October 19, 2025. Motioned by Leslie Yauckoes Seconded by Eileen Mahoney Vote: Unanimous Point of order from John Fisher – All in favor cannot be unanimous until the absentee ballots are counted
ARTICLE III.	To vote on the admission of new members: Monica Lundberg; Matthew Zimmerman; Ron Peacetree Motioned by Ron Deschenes Seconded by Warren Flewellen Vote: All in favor
ARTICLE IV.	To vote on the following nominated candidates for the 2026-27 church year. Standing Committee: Susan Woodmansee 2026-2029 (3 yr) Bill Newhard (2026-2027) (will be a partial term) Clerk: Colleen Leary 2025-2026 (1 yr.) Treasurer: Sarah Manning 2026-2027 (1 yr.) Assistant Treasurer: David Kaffine 2026-2027 (1 yr.) Collector: Diana Keohane 2026-2027 (1 yr.) Board of Investment: Barry Jefferson 2026-2027 (1 yr partial term)

	Nominating Committee: John Fisher 2026 - 2027 (1 yr renewable) Tip Rawding 2026 - 2027 (1 yr renewable) Motioned by John Schneider Seconded by Tom Coffee Vote: Unanimous
ARTICLE V.	To vote on the proposed Fiscal Year 2027 budget. Discussion: Dave talked about the canvass raising more money than ever, but we have increased expenses this year. We needed to make changes. We proposed to take money from CMF; the health care reserve is no longer needed and that \$4,000 is being used to meet operating costs. Reserves account is high so some of that was taken to use this year. Some cell money was redirected from the steeple fund, though not all, we are still putting money away for the steeple fund. John Fisher asked if we are increasing our expenses by 10% but pledges went up by 1%? A: Correct. Q: Is the CMF purpose to use this in this way? A: The hope is the CMF funds will not be exhausted for years and will continue to grow. Q: Is this sustainable? A: That is the question, we're going on faith right now but we need to talk about this in the summit in the fall. Warren Flewellen spoke saying the CMF fund is there to meet the needs of staff and this meets the requirements for use. Ron Deschenes thanked Dave Kaffine for all the work. Motioned by Dave Kaffine Seconded by Nancy Kalin Vote: Unanimous
ARTICLE VI.	To vote on the proposed Fiscal Year 2027 Use of Cell Tower Revenue budget. Dave Kaffine spoke on the current plan to divide cell money into facilities and services (services = discretionary fund, faith in action, etc. Facilities = larger projects to include roof repairs.) Motioned by Beth Benoit Seconded by Christina Cervantes Vote: Unanimous
ARTICLE VII.	To vote to approve the 2025 audit report. Motioned by John Schneider Seconded by Dave Kaffine Vote: Unanimous
ARTICLE VIII.	To vote on the delegates to the 2026 UUA General Assembly. This is a problem because GA is being held today. There is nothing in the bylaws that says we need to vote. Because it is online it is confusing. Dave Kaffine moved to elect no members to go this year. Seconded by John Schneider All in favor (this was not on absentee ballot so it is different)

ARTICLE IX.	To hear a presentation on the problems with the roof. Walter Cole spoke: This building is 180 years old as is the roof. Our roof is sagging. There are not enough boards. The insurance company inspected and we have done things to correct immediate issues. We need to add boards to support the current slate roof. There is a preliminary drawing to get quotes. No cost estimate at this point, will have them in October. Beth Benoit asked if the slate will all have to go off then the supports are put in, and then the slates put back on. A: Yes. Walter is going to the historical society to see if a look-like-slate alternative material rather than slate is acceptable. This will lower the cost but we will not get 180 years out of the roof. Leslie Yauckoes asked if it is just the church roof not the RE wing and flat roof. A: Correct. Walter did the flat roof some time ago and the RE wing was done in with the rebuild. Big thanks to Walter.
ARTICLE X.	New ways and means task force. John Schneider spoke: The Standing Committee recently established a Ways and Means Task Force to study and recommend ways to improve our fiscal stewardship and ensure decision-making is aligned with our mission and values. “That the Standing Committee establish a Ways and Means task force for the purposes of 1) developing a revenue and expenses plan and recommendations for First Parish’s operational budget for FY28, 29, and 30; and 2) develop a program for improving Congregational engagement, awareness, and commitment to the practice of fiscal stewardship at First Parish to ensure fiscal decision-making is aligned with First Parish’s values and mission. Task Force members shall include: Treasurer, Collector, one member of the Standing Committee, one member of the Board of Investment, and two at-large members chosen by the Standing Committee. The Task Force shall provide periodic reports to the Standing Committee on its progress and provide a progress report to the Congregation no later than January 2027 and make a full report no later than the 2027 Annual Meeting.” Looking for people to join (2 members)
ARTICLE XI.	Any other discussion. To vote to adjourn the meeting. Motioned by John Schneider Seconded by Mary Ganor Vote: All in favor

Auditor's Report 2025 – 2026

The Audit Committee completed its review of First Parish's finances for the year ending June 30, 2026, using guidelines recommended by the Unitarian Universalist Association (UUA). We looked at financial records, reports, procedures, and a sample of activity involving investments, money collected, and expenses.

We are pleased to report that First Parish's finances are being handled with care and responsibility by our volunteers and staff. Records were well maintained, bank and accounting balances were checked regularly, and reports from the Treasurer, Collector, and Board of Investments gave an accurate picture of the church's finances.

Investments were managed thoughtfully to help fund the church's work each year while protecting the endowment for the future. Donations, pledges, rental income, and other money received were properly recorded and matched against bank and accounting records. Our review of electronic and paper records also found sensible safeguards for the church's finances.

The committee recommended documenting key financial procedures to help future leaders, creating a clear policy for how long records should be kept, and reviewing investment practices from time to time.

We thank Dave Kaffine, Sarah Manning, Carla Corey, Ramon Cervantes, and Barry Jefferson for their help throughout the audit. We also celebrate Dave, Carla, and Barry, who completed their service as Treasurer, Collector, and Board of Investments Chair, respectively, during the year. Their generous service strengthened First Parish's finances and helped new leaders step into these roles.

We are pleased to share that First Parish's finances continue to be managed responsibly and with care. The time, skill, and generosity of our members, staff, and leaders sustain our community and help us live out our covenant together. We are deeply grateful to everyone who contributes to this shared work.

Respectfully submitted,
Susan Woodmansee, Doug Snow, Joe Volk
FY26 Audit Committee

Treasurer's Report for FY26 - Ending June 30, 2026

FY26 was the third and final year in my current term as Treasurer. I would like to thank the members of the Finance Committee for their assistance in overseeing and reviewing our church finances: Sarah Manning (Current Treasurer and Assistant Treasurer in FY26), Diana Keohane, Nancy Kaelin, Chris Sweetnam, Neil Harmon, Rebecca Gore, and Tom Coffey. Additional thanks to Susan DeMinico (Bookkeeper), and Carla Corey (Collector) for their work in keeping our financial records up to date.

As in previous years, the budget that the congregation passed for FY26 was intentionally not balanced – it had a \$10K deficit, with the expectation based on history that we would still end the year with a surplus (with last year being a notable exception). And that was indeed the case – we ended the year with a \$7K surplus.

The main contributors to the discrepancies between budgeted and actual finances were:

- Income was right on target. Some income categories were higher or lower than budgeted but balanced each other out:
 - Building use (rentals) was \$4K under budget
 - Fundraising was \$3K above budget
 - Transfers from other accounts were \$2K above budget (primarily from snow removal escrow fund)
- Total expenses were \$17K under budget:
 - Staff expenses were \$17K under budget. This is not a result of increasing hours for our Congregational Administrator (which was covered by use of the Carlene Merrill Fund), but included an unfilled RE Assistant position (\$8K), unfilled permanent music director position (\$3K), and unspent professional allowances (\$6K)
 - Building expenses were \$12K over budget due to snow removal costs (\$5K) along with increases in utilities (\$1K), janitorial (\$3K), and insurance costs (\$3K)
 - Operating expenses were \$10K under due to our bookkeeper needing fewer hours than budgeted

The FY27 budget has already taken the expense increases, bookkeeper savings, and extra successful fundraising into account. It also used a prediction of a \$7.5K surplus, very close to our actual surplus.

Although Canvass and budgeting can sometimes be a struggle, the church continues to be in good financial health, with plenty of emergency reserves. A big reason for this is the generous contributions of time, talent, and of course treasure from the whole First Parish community. Many thanks for your generosity! In addition, we are thankful for the contribution of the Eustace B. and Nancy M. Fiske Foundation toward the maintenance of our building and grounds.

More detailed FY26 financial information can be found in the reports on the following pages. If anyone ever has questions or concerns about the financial operations of First Parish, please do not hesitate to contact me (or the current Treasurer).

It has been an honor serving as Treasurer these past three years – thank you for your trust & support.

Reports Attached

- June 30, 2026 - Balance Sheet (with 6/30/25 comparison)
- FY26 Income and Expense vs Budget – Summary Report
- FY26 Income and Expense vs Budget – Detail Report
- Restricted Funds – Fiske Foundation summary

Respectfully submitted,
Dave Kaffine, Treasurer

First Congregational Society, Unitarian
Statement of Financial Position
As of June 30, 2026

	Total	
	As of Jun 30, 2026	As of Jun 30, 2025 (PP)
ASSETS		
Current Assets		
Bank Accounts		
1012 Rockland Trust	28,066.57	44,934.37
1013 Rockland - Min. Discretionary	1,249.42	4,134.28
1014 Rockland - Debit Cards	2,350.67	679.37
1015 Fidelity Investments	284,226.22	242,184.49
Total Bank Accounts	\$ 315,892.88	\$ 291,932.51
Total Current Assets	\$ 315,892.88	\$ 291,932.51
TOTAL ASSETS	\$ 315,892.88	\$ 291,932.51
LIABILITIES AND EQUITY		
Liabilities		
Current Liabilities		
Other Current Liabilities		
2400 Temporary Holding Funds		
2808 Due to Carlene Merrill Fund	250.00	100.00
Total 2400 Temporary Holding Funds	\$ 250.00	\$ 100.00
2410 Fiske Foundation Grant	0.00	20,000.00
2420 Community Table Fund	1,634.46	1,634.32
2430 SC Discretionary Fund	917.21	2,451.64
2760 Pledges Next Year	21,170.00	23,840.00
2780 Faith In Action Grants	1,409.78	3,821.14
2811 Ministers Discretionary Funds	1,249.42	5,134.28
Total Other Current Liabilities	\$ 26,630.87	\$ 56,981.38
Total Current Liabilities	\$ 26,630.87	\$ 56,981.38
Long-Term Liabilities		
2300 Reserve Funds		
2320 Service Programs Fund	0.00	1,999.71
2330 Facilities Reserves Fund	0.00	12,096.61
2340 Operating Reserves	133,804.29	124,945.95
Total 2300 Reserve Funds	\$ 133,804.29	\$ 139,042.27
2774 Capital Improvements Fund	30,893.49	-4,045.52
2776 Minister Sabbatical Fund	2,000.00	2,000.00
2777 Steeple Fund	55,396.00	53,396.00
2782A Service Trips - Johan Memorial	9,030.00	9,030.00
2784 Ministerial Intern Fund	3,000.00	3,000.00
2785 Ministerial Search Fund	5,000.00	
2787 General Assembly Trip Fund	890.00	-110.00
2788 All Church Retreat Fund	2,418.44	2,418.44
2792 Health Insurance Fund	3,767.90	7,767.90
2816 Hand Bells	1,238.50	1,238.50
2818 Organ repair and maint.	939.00	939.00
2880 Information Technology Fund	3,123.76	3,123.76
2881 Sanctuary A/V Upgrades	5,000.00	
2890 Building Equip and Repair	-256.45	4,159.74
2891 Reserve Snow Removal	600.00	5,500.00
Total Long-Term Liabilities	\$ 256,844.93	\$ 227,460.09
Total Liabilities	\$ 283,475.80	\$ 284,441.47
Equity		
1016 Fidelity Unrealized Gain/Loss	25,281.64	14,074.93
3010 Unrestrict (retained earnings)	0.00	0.00
Net Revenue	7,135.44	-6,583.89
Total Equity	\$ 32,417.08	\$ 7,491.04
TOTAL LIABILITIES AND EQUITY	\$ 315,892.88	\$ 291,932.51

Saturday, Aug 01, 2026 10:05:05 AM GMT-7 - Cash Basis

First Congregational Society, Unitarian
Budget vs. Actuals: FY_2025_2026 - FY26 P&L
July 2025 - June 2026

	Actual	Budget	Total over Budget	% of Budget
Revenue				
4010 Collectors Deposit	281,596.99	282,550.00	-953.01	99.66%
4020 Fund Raising	16,532.88	13,500.00	3,032.88	122.47%
4030 Building Use	26,705.00	30,940.00	-4,235.00	86.31%
4050 Transfers to Operating	122,316.11	120,000.00	2,316.11	101.93%
Total Revenue	\$ 447,150.98	\$ 446,990.00	\$ 160.98	100.04%
Gross Profit	\$ 447,150.98	\$ 446,990.00	\$ 160.98	100.04%
Expenditures				
7200 Salaries & related expenses	294,945.13	311,774.54	-16,829.41	94.60%
7500 Other personnel expenses	2,123.08	2,700.00	-576.92	78.63%
8100 Operating Expenses	27,148.46	36,438.00	-9,289.54	74.51%
8200 Building Expenses	79,578.35	67,710.00	11,868.35	117.53%
8310 UUA Contributions	21,013.00	21,013.00	0.00	100.00%
8500 Committees	15,207.52	17,310.00	-2,102.48	87.85%
Total Expenditures	\$ 440,015.54	\$ 456,945.54	-\$ 16,930.00	96.29%
Net Operating Revenue	\$ 7,135.44	-\$ 9,955.54	\$ 17,090.98	-71.67%
Net Revenue	\$ 7,135.44	-\$ 9,955.54	\$ 17,090.98	-71.67%

Saturday, Aug 01, 2026 09:55:04 AM GMT-7 - Cash Basis

First Congregational Society, Unitarian
Budget vs. Actuals: FY_2025_2026 - FY26 P&L
July 2025 - June 2026

	Actual	Budget	Total over Budget	% of Budget
Revenue				
4010 Collectors Deposit		0.00	0.00	
4011 Prior Year Pledges	6,500.00	8,000.00	-1,500.00	81.25%
4012 Current Year Pledges	263,676.66	266,750.00	-3,073.34	98.85%
4013 Known Donors	4,742.00	3,000.00	1,742.00	158.07%
4014 Sanctuary Plate	7,201.10	5,000.00	2,201.10	144.02%
4015 Online Donation Fees	-522.77	-200.00	-322.77	261.39%
Total 4010 Collectors Deposit	\$ 281,596.99	\$ 282,550.00	-\$ 953.01	99.66%
4020 Fund Raising		0.00	0.00	
4023 July 4th Net			0.00	
4023A July 4th Income	2,255.50	2,000.00	255.50	112.78%
4023B July 4th Expense	-246.32	-500.00	253.68	49.26%
Total 4023 July 4th Net	\$ 2,009.18	\$ 1,500.00	\$ 509.18	133.95%
4025 Holiday Fair Net		1,500.00	-1,500.00	0.00%
4025A Holiday Fair Income	4,117.00		4,117.00	
4025B Holiday Fair Expense	-1,720.65		-1,720.65	
Total 4025 Holiday Fair Net	\$ 2,396.35	\$ 1,500.00	\$ 896.35	159.76%
4027 Auction Net		9,000.00	-9,000.00	0.00%
4027A Auction Income	11,272.00		11,272.00	
4027B Auction Expense	-375.00		-375.00	
Total 4027 Auction Net	\$ 10,897.00	\$ 9,000.00	\$ 1,897.00	121.08%
4029 Other Fundraising Net		1,500.00	-1,500.00	0.00%
4029A Other Fundraising Income	1,661.00		1,661.00	
4029B Other Fundraising Expense	-430.65		-430.65	
Total 4029 Other Fundraising Net	\$ 1,230.35	\$ 1,500.00	-\$ 269.65	82.02%
Total 4020 Fund Raising	\$ 16,532.88	\$ 13,500.00	\$ 3,032.88	122.47%
4030 Building Use		0.00	0.00	
4031 Alcoholics Anonymous	1,750.00	1,500.00	250.00	116.67%
4032 Overeaters Anonymous	60.00	600.00	-540.00	10.00%
4033 Room Rentals- Other	2,525.00	6,000.00	-3,475.00	42.08%
4036 Nursery School	22,370.00	22,340.00	30.00	100.13%
4039 Weddings, Funerals		500.00	-500.00	0.00%
Total 4030 Building Use	\$ 26,705.00	\$ 30,940.00	-\$ 4,235.00	86.31%
4050 Transfers to Operating			0.00	
4040 Investment Income	75,000.00	75,000.00	0.00	100.00%
4041 Cell Tower 2 tranfers to Operat	17,000.00	17,000.00	0.00	100.00%
4042 Transfer from escrows	4,900.00		4,900.00	
4043 Prev Yr Surplus Carried Forward	7,416.11	10,000.00	-2,583.89	74.16%
4044 Carlene Merrill Fund Distribution	18,000.00	18,000.00	0.00	100.00%
Total 4050 Transfers to Operating	\$ 122,316.11	\$ 120,000.00	\$ 2,316.11	101.93%
Total Revenue	\$ 447,150.98	\$ 446,990.00	\$ 160.98	100.04%
Gross Profit	\$ 447,150.98	\$ 446,990.00	\$ 160.98	100.04%
Expenditures				
7200 Salaries & related expenses			0.00	
7210 Minister TCM			0.00	
7211 Salary Minister	72,950.88	72,950.92	-0.04	100.00%
7212 Housing	30,000.00	30,000.00	0.00	100.00%
7213 Fica Reimb	7,875.84	7,875.75	0.09	100.00%
7214 Pension/Minister/Employer	10,295.04	10,295.09	-0.05	100.00%
7216 LTD Insurance Minister	1,338.36	1,338.36	0.00	100.00%
7217 Life Insurance Minister	816.00	864.79	-48.79	94.36%
7229 Professional Allowance Minister	4,822.09	7,978.70	-3,156.61	60.44%
Total 7210 Minister TCM	\$ 128,098.21	\$ 131,303.61	-\$ 3,205.40	97.56%

7300 Director of Faith Formation				0.00	
7310 Salary Director of FF	65,922.48	65,922.55	-0.07	100.00%	
7311 Pension/DFF/Employer	6,592.31	6,592.26	0.05	100.00%	
7315 Prof Allowance DFF	4,619.42	5,109.00	-489.58	90.42%	
7316 LTD Insurance DFF	857.04	856.99	0.05	100.01%	
7317 Life Insurance DFF	553.80	553.75	0.05	100.01%	
Total 7300 Director of Faith Formation	\$ 78,545.05	\$ 79,034.55	-\$ 489.50	99.38%	
7320 Director of Music			0.00		
7322 Salary Director of Music	29,652.00	28,892.12	759.88	102.63%	
7323 Pension/Music/Employer		2,889.21	-2,889.21	0.00%	
7325 Prof Allowance Music Director		2,239.14	-2,239.14	0.00%	
7326 LTD Music Director	0.00	375.60	-375.60	0.00%	
7327 Life Insurance Music Director	0.00	242.69	-242.69	0.00%	
Total 7320 Director of Music	\$ 29,652.00	\$ 34,638.76	-\$ 4,986.76	85.60%	
7330 Office Admin/Asst.			0.00		
7318 Life Insurance Admin	254.50	245.40	9.10	103.71%	
7319 LTD Insurance Admin	393.80	393.80	0.00	100.00%	
7333 Pension/Admin/Employer	1,887.30	1,817.40	69.90	103.85%	
7335 Salary Office Assistant	32,247.20	31,035.12	1,212.08	103.91%	
Total 7330 Office Admin/Asst.	\$ 34,782.80	\$ 33,491.72	\$ 1,291.08	103.85%	
7370 Faith Formation Assistant		7,800.59	-7,800.59	0.00%	
7399 Derate actual employee hours		-1,000.00	1,000.00	0.00%	
7400 Payroll taxes	7,383.32	10,172.75	-2,789.43	72.58%	
7405 Health care reimbursement	16,483.75	16,332.41	151.34	100.93%	
7600 Next Year Merit salary bucket		0.15	-0.15	0.00%	
Total 7200 Salaries & related expenses	\$ 294,945.13	\$ 311,774.54	-\$ 16,829.41	94.60%	
7500 Other personnel expenses			0.00		
7520 Staff Development	200.00	400.00	-200.00	50.00%	
7530 Staff Recognition	67.33	300.00	-232.67	22.44%	
7540 WC Insurance	1,855.75	2,000.00	-144.25	92.79%	
Total 7500 Other personnel expenses	\$ 2,123.08	\$ 2,700.00	-\$ 576.92	78.63%	
8100 Operating Expenses			0.00		
8101 Bank service fees	4.50		4.50		
8110 Office Supplies	782.64	500.00	282.64	156.53%	
8120 Information Technology	3,328.51	3,000.00	328.51	110.95%	
8130 Telephone	3,063.18	2,400.00	663.18	127.63%	
8135 Cell Phones	1,767.37	2,000.00	-232.63	88.37%	
Total 8130 Telephone	\$ 4,830.55	\$ 4,400.00	\$ 430.55	109.79%	
8140 Postage, shipping, delivery	462.57	500.00	-37.43	92.51%	
8150 Printers and Copiers			0.00		
8151 Lease/Maintenance Contract	2,628.00	2,628.00	0.00	100.00%	
8154 Printer and Copier supplies	424.50	500.00	-75.50	84.90%	
Total 8150 Printers and Copiers	\$ 3,052.50	\$ 3,128.00	-\$ 75.50	97.59%	
8160 Nursery Services	4,208.70	4,260.00	-51.30	98.80%	
8170 Organ & Piano Service	1,770.00	2,000.00	-230.00	88.50%	
8190 Payroll Service	3,098.93	3,200.00	-101.07	96.84%	
8195 Contracted Bookkeeping Services	5,609.56	13,905.00	-8,295.44	40.34%	
8196 Contracted Business Manager		1,545.00	-1,545.00	0.00%	
Total 8100 Operating Expenses	\$ 27,148.46	\$ 36,438.00	-\$ 9,289.54	74.51%	
8200 Building Expenses			0.00		
8210 Fire Alarm Services			0.00		
8211 Alarm Annual Testing	452.00	500.00	-48.00	90.40%	
8212 Alarm Monitoring	894.00	600.00	294.00	149.00%	
8213 Alarm Repair	312.84	250.00	62.84	125.14%	
8214 Fire Extinguisher Inspect	215.75	350.00	-134.25	61.64%	
8215 Sprinkler System Inspect	713.48	1,400.00	-686.52	50.96%	
Total 8210 Fire Alarm Services	\$ 2,588.07	\$ 3,100.00	-\$ 511.93	83.49%	
8220 Elevator Services	7,697.88	6,900.00	797.88	111.56%	
8230 Equipment Purchase/Repair	1,321.08	1,500.00	-178.92	88.07%	

8235 A/V for Sanctuary	960.00	900.00	60.00	106.67%
8236 Safety Committee	297.56	500.00	-202.44	59.51%
8240 Utilities			0.00	
8241 Utilities - Gas	7,774.38	6,000.00	1,774.38	129.57%
8242 Utilities - Electric	7,602.20	8,000.00	-397.80	95.03%
8243 Utilities - Water	924.40	800.00	124.40	115.55%
8244 Utilities - Sewer	916.05	1,000.00	-83.95	91.61%
Total 8240 Utilities	\$ 17,217.03	\$ 15,800.00	\$ 1,417.03	108.97%
8250 Custodial Service and Supplies			0.00	
8251 Custodial Services	12,205.00	9,000.00	3,205.00	135.61%
8252 Custodial Supplies	1,273.00	1,200.00	73.00	106.08%
Total 8250 Custodial Service and Supplies	\$ 13,478.00	\$ 10,200.00	\$ 3,278.00	132.14%
8260 Maintenance Building		6,210.00	-6,210.00	0.00%
8261 General Maintenance	3,864.14		3,864.14	
8262 HVAC Maintenance	1,255.42		1,255.42	
8263 Kitchen Maintenance	275.00		275.00	
Total 8260 Maintenance Building	\$ 5,394.56	\$ 6,210.00	-\$ 815.44	86.87%
8271 Snow Removal	14,500.00	9,500.00	5,000.00	152.63%
8271A Snow removal expenses	-100.00		-100.00	
Total 8271 Snow Removal	\$ 14,400.00	\$ 9,500.00	\$ 4,900.00	151.58%
8272 Trash Removal	2,611.92	2,400.00	211.92	108.83%
8280 Insurance	13,612.25	10,700.00	2,912.25	127.22%
Total 8200 Building Expenses	\$ 79,578.35	\$ 67,710.00	\$ 11,868.35	117.53%
8310 UUA Contributions	21,013.00	21,013.00	0.00	100.00%
8500 Committees			0.00	
8501 Committee derating factor		-3,500.00	3,500.00	0.00%
8515 Archives		50.00	-50.00	0.00%
8521 Welcoming Congregation	813.81	1,940.00	-1,126.19	41.95%
8525 Canvass	26.14	100.00	-73.86	26.14%
8535 Flowers	311.51	300.00	11.51	103.84%
8538 Green Ministry	677.09	500.00	177.09	135.42%
8540 Grounds	404.00	800.00	-396.00	50.50%
8545 House Management		150.00	-150.00	0.00%
8555 Membership	746.56	650.00	96.56	114.86%
8557 Ministry	272.59	300.00	-27.41	90.86%
8560 Music	1,703.54	3,700.00	-1,996.46	46.04%
8570 Parish Affairs	593.13	760.00	-166.87	78.04%
8572 Pastoral Care	313.29	300.00	13.29	104.43%
8575 Publicity	395.66	310.00	85.66	127.63%
8580 Lifespan Faith Formation	7,070.73	7,150.00	-79.27	98.89%
8585 Social Action	250.00	1,075.00	-825.00	23.26%
8590 Standing Committee	283.18	400.00	-116.82	70.80%
8599 Worship	1,346.29	2,325.00	-978.71	57.90%
Total 8500 Committees	\$ 15,207.52	\$ 17,310.00	-\$ 2,102.48	87.85%
Total Expenditures	\$ 440,015.54	\$ 456,945.54	-\$ 16,930.00	96.29%
Net Operating Revenue	\$ 7,135.44	-\$ 9,955.54	\$ 17,090.98	-71.67%
Net Revenue	\$ 7,135.44	-\$ 9,955.54	\$ 17,090.98	-71.67%

Saturday, Aug 01, 2026 09:54:22 AM GMT-7 - Cash Basis

First Congregational Society, Unitarian
Transaction List by Tag Group
 July 2025 - June 2026

	Date	Transaction Type	Num	Name	Memo/Description	Amount
Fiske Foundation						
	07/01/2025	Check	11726	Stanley Elevator Company, Inc	elevator maintenance invoice 567609	-535.02
	08/10/2025	Check	11747	Rosal Painting	INV0014 - vestry painting	-1,850.00
	09/06/2025	Check	11763	Stanley Elevator Company, Inc	Inv575595 monthly maintenance	-535.02
					Invoice #71313- 2nd payment	
	09/12/2025	Check	11767	Eric C Foster	Second Floor Heating	-9,295.99
	09/20/2025	Check	11772	Stanley Elevator Company, Inc	Reissue of check for August payment inv 571216	-535.02
	10/06/2025	Check	11786	Stanley Elevator Company, Inc	Oct Invoice 577461	-535.02
	10/23/2025	Deposit		Eustace B. and Nancy M. Fiske Foundation	Fiske Foundation grant	20,000.00
	10/31/2025	Check	11810	Joseph Raboin	Slate Roof Repair 50% deposit invoice date 10/19/25	-2,200.00
	11/07/2025	Check	11812	Stanley Elevator Company, Inc	Maintenance Invoice #58061	-535.02
	11/07/2025	Check	11814	New England Fire & Sprinkler Protection	Invoice 13203599 service call for state elevator inspection	-1,068.00
	12/05/2025	Check	11844	Stanley Elevator Company, Inc	Maintenance Invoice #583475	-534.78
	12/05/2025	Check	11847	Joseph Raboin	Slate Roof Repair Balance Due	-2,200.00
	01/09/2026	Check	11869	Stanley Elevator Company, Inc	Maintenance Invoice #587348	-570.00
	01/23/2026	Check	11880	Commonwealth of Massachusetts	Boiler inspection payment notice 226769	-50.00
	02/06/2026	Check	11892	Stanley Elevator Company, Inc	Maintenance Invoice #590522	-570.00
	02/25/2026	Check	11906	Raistrick Engineering	Roof structural assessment - Inv. 2026-122	-2,000.00
	03/07/2026	Check	11914	Stanley Elevator Company, Inc	Maintenance Invoice #INV593541	-570.00
	04/02/2026	Check	11929	Raistrick Engineering	Roof structural assessment - Inv. 2026-135	-2,000.00
	04/10/2026	Check	11936	Hood Solutions, Inc	Hood inspection	-275.00
	04/10/2026	Check	11937	Stanley Elevator Company, Inc	Maintenance Invoice #INV596855	-570.00
	05/06/2026	Check	11954	Stanley Elevator Company, Inc	Maintenance Invoice #INV600114	-570.00
	06/08/2026	Check	11977	Stanley Elevator Company, Inc	Maintenance Invoice #INV602985	-570.00
Total for Fiske Foundation						-\$ 7,568.87

Saturday, Aug 01, 2026 11:43:14 AM GMT-7

Collector's Report 2025 – 2026

Please find below a record of all deposits processed through the Collector for FY2026. As always, I am appreciative of the help received from Office Staff – namely Erica Clifford and Susan DeMinico – and from our Treasurer, Dave Kaffine.

This was the 7th and final year that I have served the Congregation in this capacity. From day one I have always been amazed at the generosity of our beloved community. Thank you for the trust you have placed in me and rest assured that the baton has been passed to someone who is diligent, capable, and has the best interests of First Parish at heart. It has been a pleasure to work with Diana Keohane during this transition.

Respectfully submitted,
Carla Corey, Collector

<u>Account Name</u>	<u>Total</u>
2024-2025 Pledge	3,800.00
2025-2026 Pledge	239,836.66
2026-2027 Pledge	21,170.00
Carlene Merrill Fund	44,740.76
Known Donor	13,342.00
Loose Collection	7,201.10
Share-the-Plate	1,797.00
Minister's Discretionary Fund	500.00
Memorial Gift	200.00
Total	\$ <u>332,587.52</u>

First Congregational Society (Unitarian)
Account Totals
For 07/01/2025 - 06/30/2026

Account Name	Cash	Check	CC#	Direct	Online	Other	Total
2024-2025 Pledge	\$0.00	\$3,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,800.00
2025-2026 Pledge	\$1,045.00	\$229,460.78	\$0.00	\$1,280.88	\$8,050.00	\$0.00	\$239,836.66
2026-2027 Pledge	\$10.00	\$21,010.00	\$0.00	\$0.00	\$150.00	\$0.00	\$21,170.00
Alternative House	\$253.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$253.50
Carlene Merrill Fund	\$570.76	\$44,100.00	\$0.00	\$0.00	\$70.00	\$0.00	\$44,740.76
Known Donor	\$40.00	\$12,690.00	\$0.00	\$0.00	\$612.00	\$0.00	\$13,342.00
Loose Collection (AM)	\$6,635.05	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,635.05
Loose Collection (PM)	\$566.05	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$566.05
MARCH	\$243.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$243.50
Mass IPL	\$204.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$204.00
Memorial Gift	\$0.00	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	\$200.00
Merrimack Valley Project	\$258.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$258.00
Minister's Discretionary Fund	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00
MRWC Merrimack River Watershed Council	\$297.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$297.00
Sanctuary Boston	\$240.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$240.00
Trevor Project	\$301.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$301.00
Totals:	\$10,663.86	\$311,660.78	\$0.00	\$1,280.88	\$8,982.00	\$0.00	\$332,587.52

Board of Investments FY 2025 Annual Report

The Board of Investments is tasked with overseeing the investment of the Society's endowment funds, keeping an accurate accounting of said funds, and recommending a sum to be used in defraying the annual operating budget. The Treasurer is an ex-officio member of the Board of Investments.

At its January 26, 2026 meeting, the Board set the endowment contribution for the 2026-2027 fiscal year at 4% of the 13-quarter rolling average of the non-Carlene-Merrill funds, calculated at \$1,951,073.33. The resulting recommendation is \$79,000 annually, or \$19,750 per quarter. During FY2026, the quarterly operating-budget contribution remained \$18,750. Throughout the fiscal year, the Board was able to source each quarterly distribution from cash/money-market sweep balances or selling investment positions as recommended by Burbank Wealth Management when existing cash was insufficient.

The Board continued its review of the purpose and long-term use of the Carlene Merrill HR Fund. In July, it considered a Standing Committee proposal to transfer \$100,000 from the Main Endowment into the Carlene Merrill Fund. After reviewing four scenarios, the Board reached consensus that the transfer should be deferred while the church develops clearer objectives for the fund, its expected lifetime, staffing expenses, and the role of congregational pledges. The Board also expressed general support for using special-purpose funds intentionally rather than preserving them indefinitely through matching withdrawals from the Main Endowment.

Investment management and reporting continued to evolve during the year. Burbank Wealth advised that Wells Fargo would sunset the existing ESG portfolios. The Board approved moving the ESG and Carlene Merrill advisory structure into the same Personalized Unified Managed Account (PUMA) framework as the Main Endowment, while preserving existing allocation percentages except for consolidation of the mid-cap ESG holdings. Burbank will continue to evaluate the funds, monitor Morningstar ESG ratings, and recommend changes as appropriate. The Board also refined reporting by showing the Carlene Merrill Fund separately and adding ESG Risk Ratings for the Main Endowment and the Carlene Merrill/ESG funds.

Portfolio performance finished FY2026 on a strong note after the weaker March quarter. Fiscal-year 2026 total return, not accounting for time-weighted returns on deposits and withdrawals, from July 1 through June 30 were as follows:

Main Endowment (*7823): +16.39%

ESG Fund (*1396): +11.38%

Carlene Merrill Fund (*3810): +13.26%

As of June 30, 2026, our holdings and percentage of total were as follows:

Main Endowment (*7823): \$2,202,200.63 (85.34%)

ESG Fund (*1396): \$240,117.36 (9.31%)

Carlene Merrill Fund (*3810): \$138,050.99 (5.35%)

Total: \$2,580,368.98 (100%)

Total holdings ended the fiscal year at \$2,580,368.98, an increase of \$361,923.82, or 16.31%, from June 30, 2025. The growth in total holdings includes contributions and withdrawals and therefore is not itself an investment-performance measure.

Total new contributions through fundraising efforts to the Carlene Merrill Fund during the year were \$48,590.76, which included \$9,550.76 from the Carlene Merrill Dinner in September 2025. The church completed a withdrawal of \$18,000 in the final fiscal quarter of 2026 from the Carlene Merrill fund as approved by the standing committee.

Total new contributions to the General Endowment Fund during the year were \$57,750.00, which included \$100 in memory of Bill Drury, \$50,000 in memory of Bill and Jane Drury, \$5,000 from Jeff & Hillary Johnson, and gifts of \$100 and \$2,550 in honor of Norm Benson.

Board officers during FY2026 were Barry Jefferson, Chairman; Ramon Cervantes, Financial Officer; Garland Kemper, Financial Reviewer; Warren Flewellen, Secretary; and Dave Kaffine, Treasurer.

The Board thanks Barry Jefferson for agreeing to stay on the Board for an additional year and also welcomes Sarah Manning as the new Treasurer starting July 2026.

The Board meets on the fourth Monday of January, April, July, and October, with additional meetings as required. All meetings are open to members of the parish.

Ramon Cervantes, Chairman
Barry Jefferson, Financial Officer
Garland Kemper, Financial Reviewer
Warren Flewellen, Secretary
Sarah Manning, Treasurer

Our Endowment Funds designated "Miscellaneous Bequests for General Use" were given by or in honor of the following people:

Deacon Otis Adams	1876	300.00	Charles Ruiter	2000	1215.00
Ephraim Parkhurst	1879	450.00	Carl McKittrick	2000	1440.00
Donations	1883	200.00	Charlotte DeWolf	2000	480.00
O. Emerson	1885	316.67	Julia Fogg	2000	295.84
Martha P. Dickson	1889	12.00	Dorothy Cook	2000	1050.00
Joseph Warren	1890	1000.00	Alan Kent	2000	977.49
Henrietta Richardson	1896	100.00	Madelon Clough	2003	10000.00
Benjamin Fiske	1901	1000.00	Beth & Carole	2004	685.00
Jeremiah J. Shedd	1902	200.00	Robert Russell	2004-5	2345.00
Sarah P. Emerson	1903	100.00	Hazel Fiske	2004	375.00
A. Howard Richardson	1904	150.00	Roman Muniichiello	2005	250.00
Jos. & Benj. Fiske	1905	1500.00	Maxine McKittrick	2005	635.00
Emily Reid	1910	100.00	Reid & Anna Johnston	2005	500.00
M.C. Reed	1911	100.00	Eleanor Butterfield	2006	10824.60
Silina G. Richardson	1915	200.00	Joan Russell	2008	550.00
Church members	1913	135.15	Wilson Family	2008	200.00
Cora A.G. Flint	1922	3000.00	David Johnston	2008	500.00
Mary E. Richardson	1926	100.00	Jane Drury	2009-10	1945.00
Celia A. Richardson	1926	100.00	Shirley Martino	2010	285.00
Martha Warren	1939	110.41	Madelon Clough	2010	125.00
Anna Searle	1941	200.00	Roy Mellen	2010	565.00
F.A.P. Fiske	1943	3000.00	Barbara Parkhurst	2011	410.00
Albert H. Davis	1944	300.00	Geoffrey Jody	2011	375.00
Frank Emerson	1957	6726.50	Dennis Doughty	2013	2500.00
Parker Fund	1957	409.40	John E. Anastos	2013	150.00
Edith Perham	1958	1000.00	Barbara Crouch	2013	300.00
Edith W. Emerson	1958	1000.00	Cynthia Watson	2017	61811.30
Unitarian Players	1963	500.00	Thomas Wight	2019	2175.00
Misc. Mem. Fnds	1964	115.00	Audrey Wilson	2019	300.00
Anonymous	1971	348.50	Larry Pelosi	2019	100.00
Ethel C. Bartlett	1973	1000.00	Carole Russell	2022	6500.00
Levi Howard	1975	1000.00	Elizabeth George Traggis	2022	50.00
William T. Shafer	1986	1000.00	Barbara Jones	2023	10000.00
Barbara Jones	1989	1000.00	Ministry of Ellen Rowse Spero	2024	25000.00
Wallace Greig	1990	1000.00	Joan Kennedy	2024	205.00
Robert Clough	1994	2000.00	Mickey O'Connor	2024	600.00
Ralph Cole	1994-6	10075.00	Sue Sheedy	2024	1825.00
Edwin Jewett	1995-6	175.00	Daniel Yauckoes	2025	100.00
Jollene Dubner	1995-6	870.00	Bill Drury	2026	100.00
Harold J. Davis	1997-8	127350.00	Bill & Jane Drury	2026	50000.00
Robert Kuehn	1998	10500.00	Jeff & Hilary Johnson	2026	5000.00
Glenn & Phyllis King	1999	100.00	Norm Benson	2026	2650.00
C. Richmond Page	2000	5000.00			

Our Endowment Funds designated "Carlene Merrill HR Fund" were given by or in honor of the following people:

Carlene Merrill	2022-3	70350.00
Ellen Ford	2023	75.00
Rev. Ellen Spero	2025	3845.00
Carlene Merrill Dinner Fundraising	2026	9550.76
Carlene Merrill Fundraising	2026	39040.00

Report of the Board of Investments

July 1, 2025 - June 30, 2026

Rev 02 2026-08-17 R. Cervantes

Summary of Holdings

Burbank Managed UMA Mutual Funds and ETF Account

(Account 7823)

Purpose: holdings that support general operating expenses and include a combination of restricted and unrestricted funds

Value 6/30/25	FY26 Withdrawals	FY26 Deposits	Value 6/30/26	Management Fees	Total Return*	Percent Return*	Percent of Portfolio
\$1,907,970.54	\$76,280.88	\$57,750.00	\$2,202,200.63	\$15,125.64	\$312,760.97	16.39%	85.34%
Holding		Value 6/30/25	Value 6/30/26	Percent of Account			
Cash/ Money Market Sweep		\$16,701.81	\$30,017.37	1.36%			
WASHINGTON MUTUAL INVESTORS FUND (F2) WMFFX		\$435,905.13	\$494,872.23	22.47%			
THE GROWTH FUND OF AMERICA (F2) GFFFX		\$318,600.97	\$368,448.68	16.73%			
INCOME FUND OF AMERICA (F2) AMEFX		\$194,043.14	\$213,508.42	9.70%			
BOND FUND OF AMERICA (F2) ABNFX		\$120,827.77	\$121,362.93	5.51%			
EUROPACIFIC GROWTH FUND (F2) AEPFX		\$109,740.70	\$135,419.27	6.15%			
VANGUARD SM CAP VALUE ETF VBR		\$156,398.02	\$193,420.04	8.78%			
VANGUARD HIGH DIV YIELD VYM		\$162,904.82	\$192,954.63	8.76%			
iShares Russell Mid-cap Value ETF IWS		\$88,665.94	\$109,623.60	4.98%			
VANGUARD LONG TERM CORPORATE BOND ETF VCLT		\$89,789.70	\$91,203.00	4.14%			
ISHARES CORE US AGGREGATE BOND ETF AGG		\$90,172.80	\$90,863.64	4.13%			
ISHARES CORE MSCI EMERGING MARKETS ETF IEMG		\$93,526.74	\$129,810.28	5.89%			
VANGUARD SHORT-TERM BOND BSV		\$30,693.00	\$30,696.54	1.39%			
			Total:	100.00%			

*Return figures do not account for time-weighted returns on deposits/withdrawals/transfers into/from account

Burbank Managed ESG Account

(Account 1396)

Purpose: Holdings of socially responsible investments

	Value 6/30/25	FY26 Withdrawals	FY26 Deposits	Value 6/30/26	Management Fees	Total Return*	Percent Return*	Percent of Portfolio
	\$215,592.13	\$0.00	\$0.00	\$240,117.36	\$2,246.21	\$24,525.23	11.38%	9.31%
Holding	Value 6/30/25		Value 6/30/26	Value 6/30/26	Percent of Account			
Cash/ Money Market Sweep			\$8,158.68	\$3,983.24	1.66%			
Calvert High Yield Bond Fund Class I (CYBIX-US)			\$12,046.40	\$13,810.75	5.75%			
Calvert Equity Fund Class I (CEYIX-US)			\$11,939.03	\$10,223.93	4.26%			
Dodge & Cox Stock Fund Class I (DODGX-US)			\$13,214.12	\$13,879.53	5.78%			
iShares ESG Aware MSCI USA ETF (ESGU-US)			\$53,984.70	\$59,412.21	24.74%			
iShares ESG Aware MSCI USA Small-Cap ETF (ESML-US)			\$6,282.16	\$0.00	0.00%			
iShares ESG Aware MSCI EM ETF (ESGE-US)			\$0.00	\$15,477.27	6.45%			
iShares ESG Aware MSCI EAFE ETF (ESGD-US)			\$17,041.02	\$21,178.86	8.82%			
John Hancock Funds Disciplined Value Mid Cap Fund Class I (JVMIX-US)			\$8,875.93	\$17,037.28	7.10%			
Nuveen ESG Mid-Cap Growth ETF (NUMG-US)			\$6,879.90	\$0.00	0.00%			
Parnassus Mid Cap Fund Institutional Shares (PFPMX-US)			\$13,304.26	\$14,434.12	6.01%			
PIMCO Total Return ESG Fund Institutional Class (PTSAX-US)			\$16,530.51	\$18,103.65	7.54%			
TCW Emerging Markets Income Fund Class Institutional (TGEIX-US)			\$9,595.45	\$11,746.46	4.89%			
Nuveen Core Impact Bond Fund R6 Class (TSBIX-US)			\$16,194.79	\$22,648.13	9.43%			
Touchstone US Quality Bond Fund Class Y (TCPYX-US)			\$21,545.18	\$18,181.93	7.57%			
				Total:	100.00%			

*Return figures do not account for time-weighted returns on deposits/withdrawals/transfers into/from account

Burbank Managed Carlene Merrill Fund Account

(Account 3810)

Purpose: Restricted fund established by the estate of Carlene Merrill upon her passing

	Value 6/30/25	FY26 Withdrawals	FY26 Deposits	Value 6/30/26	Management Fees	Total Return*	Percent Return*	Percent of Portfolio
	\$94,882.49	\$18,000.00	\$48,590.76	\$138,050.99	\$1,078.79	\$12,577.74	13.26%	5.35%
Holding			Value 6/30/25	Value 6/30/26	Percent of Account			
Cash/ Money Market Sweep			\$3,475.78	\$1,803.68	1.31%			
Calvert High Yield Bond Fund Class I (CYBIX-US)			\$5,184.32	\$7,920.08	5.74%			
Calvert Equity Fund Class I (CEYIX-US)			\$5,077.01	\$5,939.66	4.30%			
Dodge & Cox Stock Fund Class I (DODGX-US)			\$5,848.07	\$8,053.44	5.83%			
iShares ESG Aware MSCI USA ETF (ESGU-US)			\$23,812.80	\$34,207.03	24.78%			
iShares ESG Aware MSCI USA Small-Cap ETF (ESML-US)			\$2,727.78	\$0.00	0.00%			
iShares ESG Aware MSCI EM ETF (ESGE-US)			\$0.00	\$7,383.15	5.35%			
iShares ESG Aware MSCI EAFE ETF (ESGD-US)			\$7,851.36	\$12,131.58	8.79%			
John Hancock Funds Disciplined Value Mid Cap Fund Class I (JVMIX-US)			\$3,710.49	\$9,765.97	7.07%			
Nuveen ESG Mid-Cap Growth ETF (NUMG-US)			\$2,907.00	\$0.00	0.00%			
Parnassus Mid Cap Fund Institutional Shares (PFPMX-US)			\$5,933.06	\$9,820.85	7.11%			
PIMCO Total Return ESG Fund Institutional Class (PTSAX-US)			\$7,577.59	\$10,523.68	7.62%			
TCW Emerging Markets Income Fund Class Institutional (TGEIX-US)			\$4,177.63	\$6,748.19	4.89%			
Nuveen Core Impact Bond Fund R6 Class (TSBIX-US)			\$6,810.08	\$13,172.47	9.54%			
Touchstone US Quality Bond Fund Class Y (TCPYX-US)			\$9,789.52	\$10,581.21	7.66%			
				Total:	100.00%			

*Return figures do not account for time-weighted returns on deposits/withdrawals/transfers into/from account

Totals:	\$2,218,445.16	\$94,280.88	\$106,340.76	\$2,580,368.98	\$18,450.64	\$349,863.94	15.77%	100.00%
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Summary of Funds

Note: the meaning of a Fund in this context is a pool of money donated by someone to honor individuals and/or provide for specific needs of the church.

A Restricted Fund is one that, by formal agreement with the donor, can only be used for its designated purpose. An Unrestricted Fund can be used per the discretion of church management.

With the exception of the Carlene Merrill Fund, funds are not held in separate accounts or equities apart from other investments. The existence of such funds, along with donations, withdrawals, and remaining balances, are tracked only on this spreadsheet. Currently, all non-Carlene Merrill funds are considered to reside in the Burbank UMA Mutual Funds and ETF account.

Unrestricted Funds

Fund Name	Purpose	Value 6/30/25	FY26 Donations	FY26 Withdrawals	Value 6/30/26
McFarlin Fund	General	\$145,150.45	\$0.00	\$76,280.88	\$68,869.57
General Fund	General	\$2,299,993.65	\$57,750.00	\$0.00	\$2,333,106.03
Totals:		\$2,445,144.10	\$57,750.00	\$76,280.88	\$2,401,975.60

Restricted Funds

Fund Name	Purpose	Value 6/30/25	FY26 Donations	FY26 Withdrawals	Value 6/30/26
G.A. & B.H. Parkhurst	Repairs to Building	\$6,944.32	\$0.00	\$0.00	\$6,944.32
Joan Kennedy	Music Program	\$185.00	\$0.00	\$0.00	\$185.00
Charity Funds	Needy Families	\$33,213.07	\$0.00	\$0.00	\$33,213.07
Carlene Merrill HR Fund	Human Resources	\$94,882.49	\$48,590.76	\$18,000.00	\$138,050.99
Totals:		\$135,224.88	\$48,590.76	\$18,000.00	\$178,393.38

Fund History

The General Fund includes Miscellaneous Bequests.

All dividends, interest, and capital gains are added to the General Fund except for the Carlene Merrill HR Fund

Flower Funds made up of:

	Init. Value	Year Establ.
Eustace Fiske Memorial Fund	\$325.00	1984
Bette Davis Memorial Fund	\$360.00	1991
Barbara A. Parkhurst Fund	\$500.00	1997
Helen Page Fund	\$5,000.00	2008

Charity Funds made up of:

	Init. Value	Year Establ.
Ethel P. Parker Fund	\$2,000.00	1962
William D. Phelps Fund	\$672.00	1967
Spaulding Memorial Fund	\$1,000.00	1945
First Grace Charity Funds	\$12,530.00	1995

Other restricted funds which were merged into the General Fund in 2004:

	Init. Value	Year Establ.	Purpose
Mabel P. Warren	\$500.00	1931	Grounds
Arthur H. Warren	\$200.00	1931	Music
Gregory Center	\$235.00	1973	Youth Work

Parish Minister Annual Report For 2025-2026

I am glad to report that overall, First Parish ended the year on a strong note. We welcomed new people steadily throughout 2025–2026 and celebrated five new members and one returning member at our May 3 Membership Recognition service. Our Green Committee is active and growing. Our youth participated in OWL with four other UU congregations. New energy and new ideas reshaped some of our long-standing traditions: the Auction Team brought fresh thinking to a beloved fundraiser, our Stewardship campaign found new leadership, and our Church Council was restarted after some years dormant, thanks in large part to Dolores's organization and facilitation. The Building Bridges team, led by Cheryl Wilson and Jeanette Moreau, spent the year conceiving and carrying out concrete experiments in how we communicate and connect with one another, inside these walls and beyond them. And this congregation's generosity has been remarkable: from money and bags of groceries collected for the Open Pantry of Greater Lowell at Thanksgiving, to more than \$2,000 in Market Basket gift cards shared with families and the local agencies who serve them, to a \$20,000 matching gift toward the Carlene Merrill Fund and a \$50,000 anonymous gift given in honor of Jane and Bill Drury. As costs rise and volunteer capacity shrinks, we will need honest and transparent conversations about how we sustain all of this — but I am heartened by the generosity we can build upon.

This was also a year shaped by transition. Christopher Grills's departure last spring left us in a search for a new music director that stretched across the entire church year — far longer and harder than any of us hoped. Our first viable candidate did not even apply until September, as we learned that our initial compensation offer was too low to be competitive. I am endlessly grateful to Brian Snow, who held the interim music director role with skill, creativity and good humor for twelve straight months, drawing out the best in our choirs and our worship even as he prepared for and then celebrated his own ordination in October. In April, we were finally able to introduce David Morochnik as our new, permanent Music Director, and I am grateful to our search team — Tom Coffey, Janice Tervo, Jess Volk, Cindy Gist and Peggy Stephens-North — for their patience and discernment throughout.

Last summer, we also gathered for the Carlene Merrill Legacy Dinner, a joyful evening in honor of Carlene, attended by her sons, of Bruce, and Jeff, as well as Jeff's family. It meant a great deal to them and to everyone who attended, including many faces we hadn't seen in some time — a reminder, early in the year, of how much warmth this congregation holds even in hard seasons.

We used the Carlene Merrill fund to increase Erica's office hours this year. This was a tremendous help to me, to our lay leaders and to the congregation. Her role has grown steadily, to include event logistics, support for our collector, our remote bookkeeper, our Safety Committee and our Building Liaison. She is slowly taking on primary responsibility for the website and social media, and continues to work with me, Dolores, and other lay leaders on improving communication.

This was, sadly, also a year with the loss of some beloved members: we said goodbye to Bill Drury, David Kitrosser, Alicia Page, and Norman Benson, and we were shaken in May by the sudden death of Ben Rankin while out riding his mountain bike. Our Pastoral Care and Service Team, which grew this year with the addition of Andrea Long, and the revived Helping Hands ministry led by Diana Keohane, Bill Newhard and Teri Ralbovsky, showed up for this congregation again and again.

All of this has unfolded against a country that continues to trouble and frighten me. This year brought a government shutdown, continued threats to SNAP and healthcare for our most vulnerable neighbors, and the visible presence of federal immigration enforcement tearing families apart in our own region. Preaching on the theologian Dietrich Bonhoeffer in December, I found myself returning again and again to his words from a prison cell near the end of World War II — that his was a people with "so little ground under their feet." Some days it is hard not to feel the same. And yet what I have witnessed here, even in the hardest months, is that the ground under our feet at First Parish is solid. We cannot fix what

is happening in Washington, or at the border, or in our own streets, from this sanctuary. But we can, and we do, offer one another — and our wider community — real ground to stand on: love in action, care freely given, a community that shows up. In a time of such uncertainty, that may be the most important thing we do.

Here are some notes and highlights of my ministry over the year:

Worship

I led most of our regular Sunday worship services, in partnership with Brian Snow and, for many of our intergenerational services, with Dolores. Again, we used the monthly Soul Matters themes: Building Belonging, Cultivating Compassion, Nurturing Gratitude, Choosing Hope, Practicing Resistance, Embodying Resilience, Paying Attention, Embracing Possibility, Awakening Curiosity, and finally Flourishing Together. We opened the church year with our Water Communion on September 7 and closed it with the Flower Communion on June 21. We held our full complement of holiday traditions: an intergenerational Thanksgiving service with our Open Pantry collection, Advent evening services, our Winter Solstice and Longest Night services, two Christmas Eve services — an early service with the pageant, led by Dolores, and a 7pm service of lessons and carols with Brian and our Senior and Bell Choirs — and our Pancakes service to close out the year in December. Dolores and I led an online Lenten retreat and an evening healing service in the spring. For Holy Week, we held our Tenebrae and Easter services. In addition to me, services were led by the Safety Committee, the Welcoming Congregation team, the Green Committee (with a guest speaker for Earth Day), Matt Meyer, Brenda Rogers, and our former intern Rev. Wendy Bell, who graciously stepped in while I was away in May. Our Summer Services team of Elaine Mahoney, Brian Snow, Rick Warner and Neil Harmon did a great job organizing the lay-led worship for July and August. I also had the honor of participating in Brian Snow's ordination service on October 26, offering the charge to the congregation. We had to cancel worship once, on January 25, due to snow.

Special Ceremonies and Rites of Passage

- July 12, 2025: Wedding Service for Sam Morse and Danielle Boucher at the Morse's home, Chelmsford, MA
- August 28, 2025: Memorial Service for Brenton DeWolf (son of Charlotte DeWolf) at First Parish
- October 26, 2025: Service of Ordination for Brian Snow at First Parish
- May 3, 2026: Membership Recognition Service at First Parish
 - ◆ New Members: Ron Peacetree, Matthew Zimmermann, Kathleen Talbot, Steven Davis, & Alan Sloan
 - ◆ Ten Years: Brian Snow ◆ Twenty-Five Years: Sally Seekings, Rebecca Gore, & Warren Flewellen
 - ◆ Welcomed Back: Teri Ralbovsky
- May 14, 2026: Funeral Service for Ben Rankin at Blake Funeral Home (led by Rev. Brian Snow, as Ellen was away)
- May 23, 2026: Memorial Service for David Kitrosser at First Parish
- June 13, 2026: Memorial Service for Norman Benson at First Parish
- July 18, 2026: Memorial Service for Alicia Page at First Parish

Church Committee Meetings

I regularly attended meetings of the Standing Committee, the HR Committee, the Committee on Ministry, the Worship Committee, and the Pastoral Care and Service Team throughout the year. I also attended the Standing Committee's August retreat. I met regularly with John Schneider, our Standing Committee chair. I will miss our monthly coffee meetings now that his term has ended.

This was also a year of significant ad hoc committee work: I met several times with the Music Director Search Team from last summer through the spring, attended meetings of Brian Snow's ordination committee, met with the Membership Committee to plan our May Membership service, and attended Building Bridges and Stewardship Team meetings as those efforts got underway.

Staff

I met with Erica and Dolores most Thursday mornings throughout the year, and checked in regularly with Brian — by phone, in person, and in planning sessions for hymns and music — right up through his final weeks in the interim role.

As Supervisor of Staff, I completed evaluations for both Erica and Dolores this year, meeting with Ruth Whalen Crockett of the HR Committee to review Erica's and one on one with Dolores. In January, John Schneider joined me, Dolores and Erica to talk about Church Council and other ways our staff might better support our lay leaders and congregation going forward.

Faith Formation: Dolores and I planned and led a workshop on the UUA's 2026 Common Read, *Social Change Now: A Guide for Reflection and Connection*, in partnership with CFAM's immigration response work — a three-hour session in March, followed by a second session in the spring. I led online Advent and Lenten retreats and an Intentional UU session on worship.

Pastoral Work

Pastoral care is always a constant, and this year was no exception. I am deeply grateful to the Pastoral Care and Service Team, which grew this year with the addition of Andrea Long, for the cards, calls, visits, and quiet presence they offered all year, including a training I led for the team in January. Diana Keohane, Bill Newhard and Teri Ralbovsky stepped up to reestablish our Helping Hands ministry, coordinating rides and meals for parishioners in need. Being present to one another in our joys and sorrows—with cards, phone calls, meals, prayer shawls or just listening—sounds simple but the impacts are profound. This is how we remind one another that we belong—to each other and to the Larger Spirit of Love that dwells among and within us.

Social Outreach and Public Witness

I continued to track the work of the clergy caucus of the Massachusetts Communities Action Network (MCAN) on immigrant rights, attending organizing meetings over Zoom and, in January, joining a gathering of clergy in Boston in solidarity with protesters in Minnesota. I attended an interfaith breakfast hosted by the Lowell Community Health Center, whose health, dental, and mental health services for anyone in need are increasingly strained by federal funding cuts and rising costs. I met with Aaron of the Merrimack Valley Project and spoke by phone with Oscar Burgos, the immigration aide in Congresswoman Lori Trahan's office, to continue learning how we can support our immigrant neighbors — work that our revived Council on Faith in Action Ministries (CFAM) is helping to carry forward, alongside the Building Bridges team and our Green Committee.

Denominational and Interfaith Connections

I regularly attended luncheons of the Chelmsford Interfaith Clergy group throughout the year — some months attending, other months hosting — and stayed in regular contact with my UU Women's Clergy group, leading two of our gatherings. I offered the opening and closing prayers at Chelmsford's town 9/11 remembrance.

Professional Development

I continued my monthly clergy coaching work with Larry Peers throughout the year. In May, I was honored to be accepted into a writing retreat through the Collegeville Institute, in Stoneville, North Carolina, focused on the experiences of immigrants and their descendants — meaningful, generative work, and I'm grateful the congregation gave me the time to attend.

This year asked a great deal of our lay leadership, and I want to name as many of you as I can. First, thank you to three members stepping down from the Standing Committee — Rebecca Gore, Dave Kaffine, and John Schneider, the latter after two years as our chair — and to Carla Corey, stepping down after seven years of faithful service as our collector.

Thank you to the team who made the Carlene Merrill Legacy Dinner such a success — John Schneider, Carla Corey, Ruth Whalen Crockett, Deb Grad, Diana Keohane, Mary Gaynor, and Kathy Deschenes, along with Erica, who designed the invitations and managed every detail, and Jenny Keohane, who put together the slideshow. Thank you to Carla Corey, Susan Woodmansee, Diana Keohane, Sarah Manning and Gail Burati, and all their volunteers, for running our Greens and Donuts sale. Thank you to our auction team — Gail Burati, Molly Rawding, Julie Johnston, Diana Keohane, Aggie Brennan and Meg Kaffine — for a fun and successful fundraiser that brought new ideas to an old tradition. Thank you to Susan Woodmansee, John Schneider and Tom Coffey for leading our stewardship campaign — quieter work than the auction, but no less vital to our shared life. Thank you to Walter Cole, who keeps this building running — heating system and all — with real dedication. My thanks as well to my Committee on Ministry — Leslie Yauckoes, Kathy Deschenes, Liz Peterson, Deb Grad and Gail Burati — for their steady counsel and support throughout the year.

Finally, my thanks to our staff: to Erica, who has genuinely blossomed in her role this year; to Brian, a fun and creative partner through a demanding interim year; to Susan DeMinico, our bookkeeper and business manager, whose skill makes our treasurer's work so much easier even from a distance; and to Dolores, my partner and colleague of many years, who brings beauty, creativity and spirit to faith formation for every age in this congregation, and whose stewardship of the Membership and Hospitality Committee — and whose hand in restarting our Church Council — has been a gift to us all.

At the last Standing Committee meeting of the year, I thought about something my polity professor used to say: "Polity is theology, and theology is polity" — meaning that how a religious community organizes itself reflects what it believes at its core. Our congregational polity means that, in every generation, the members of this congregation are the entrusted stewards of our shared vision and our shared faith. The relationship between clergy and laity here is not one of hierarchy, but of mutual respect and complementary responsibility. First Parish is not my congregation. I am your minister, and I serve in this role at your call, not at the direction of any bishop or presbytery. Never underestimate how powerful — how genuinely spiritual — this arrangement is, even when it shows up as budgets, staffing decisions, and building maintenance rather than anything that feels overtly sacred.

Twenty-four years in, I remain grateful beyond words for the privilege of serving as your minister. This was a year that asked a great deal of us and a year in which I watched this congregation answer those challenges with real generosity, real courage, and real hope. You remind me, year after year, what it looks like to build the beloved community imperfectly, faithfully, and together.

In faith,
The Reverend Ellen Rowse Spero

Annual Report of the Lifespan Faith Formation Director, 2025-2026

"Because of the social nature of humans... from birth to adulthood, the need for love and belonging is closely linked to the need for survival" (so we can all thrive) – Lisbeth K. ref. Abraham Maslow

I want to express my gratitude to everyone at First Parish, individual volunteers, families, and staff for the dedication and vitality they bring to congregational life offering opportunities and support to the Lifespan Faith Formation program. It was a busy and exciting year where we advanced forward together by affirming, committing to belonging today, connecting through the wisdom from the past, and continue to thrive into the future.

Religious Faith Formation continues to adjust and adapts to new realities of consistencies and inconsistencies of today's social norms. The programs did thrive, even if outmoded criteria of youth attendance fluctuated. Accepting that the "Religious Education" Sunday mornings designed in the 1950s is no longer the norm, it is hopeful to see dedicated enthusiastic families participating in all areas of congregational life. The Adult programs also thrived as new ideas gained strength and the congregation flourished throughout all areas volunteering their time, treasure and dedication and especially their love for the FPCC community. It is a joy to see the Young Adults also break the boundaries of being 'a group of a specific age range' and choosing to be accounted as active and present adults in all areas of the congregation.

We are a blessed community. They/we/us are in a community where mind, body and spirit, have been nurtured, nourished and strengthened through our willingness to commit, engage and belong to First Parish and Unitarian Universalist of Chelmsford. I am so grateful to have the honour of serving this wonderful congregation another year. Thank you!

Respectfully Submitted, Gratefully,
Dolores GHeredia-Wood
Lifespan Faith Formation Director; dre@uuchelmsford.org

This report has the following sections:

1. Lifespan Faith Formation Programming
 - a. Lifespan Faith Formation & Membership-Hospitality Committee
2. Worship and Chapel
3. Sunday "RE" Faith Formation Programs
4. Lifespan Faith Formation/"RE"FF Council
5. Administrative/Committees

1. Lifespan Faith Formation Programming

Lifespan Faith Formation encompasses many areas collaborating in order to coordinate programs.

Small Group Ministry:

FPCC Small Groups offer the gift of connection with others and YoUU Goal for SGM to maintain open door policy for new attendees as Small Groups with a variety of interests.

- Follow up of established SGM:
 - Ann Marie Sigdestad SGM continues.
 - Tom Coffey; 2 small groups; Men's Connection SGM. And Elder Men
- Monthly Small Groups
 - Sacred Circle, Co-led Amanda Salowsky
 - 70's, 80's, Beyond and Retirees "Bettered Year"; Co-led, LFFD Oversee
 - REFF Family Group
 - Intentional UU Workshops

- Additional Gatherings/Events:
 - Advent Evening Services in December including 'Holiday Fair Open House' Joy
 - Women's Epiphany gathering on January 4th; 30+Participants
 - Special Guest 'Maria Wood' Candle Making Meditation

Young Adults:

- FPCC Young Adults have chosen not to distinguish themselves as a separate group. Their preference is to be seen as part of the congregation as a whole and are integrated into all other areas of the church/committees, and events.

1a. Lifespan Faith Formation & Membership-Hospitality Committee

The committee is co-lead by all its members: Carla Corey; Frans Janssen; Amanda MacLean; Elaine Mahoney; John Fischer; Chris Sweetnam; Leslie Yauckoes; Dolores~ LFFD (oversee committee on their behalf)

- New Members: Steven Davis, Ron Peacetree, Matthew Zimmermann; Monica Lundberg; Kathleen Talbot
- Membership Recognition Service May 3rd, Recognized for time, treasure, talent and love.
 - New Members Matthew Zimmermann; Kathleen Talbot; Steven Davis
 - '26: Ron Peacetree Alan Sloan; Teri Ralbovsky (re-signed book [2008-22])
 - Ten Years: Brian Snow
 - Twenty-Five Years: Sally Seekings, Rebecca Gore, Warren Flewellen
- NEW UU Course/Retreat: LFFD Co-Ordinated/Organized,
 - Co-facilitators Elaine Mahoney; Amanda MacLean
 - New UU Participants 7: Timothy Williams; Monica Lundberg; Mark Harris; Andrea Greenwood; Mary Trombly; Steven Davis; Matthew Zimmermann
- In addition:
 - Annual Welcome! Potluck/Fall; Winter Holiday/December Pizza Meet and Greet; Spring Newcomers Meet & Greet; Two FPCC Tours
 - Resituated Pamphlet Rack and Purchased Updated Pamphlets
 - Circle Dinner Series during Summer Months
- LFFD, oversee committee on their behalf: meetings, kept records in Google Doc format in conjunction with Breeze database, posting announcements on church entrance monitor and weekly, monthly media. Co-led and coordinated New UU. Also coordinated/ Membership Recognition Service. All administrative including submitting budget; communication forms and contacting; Set up Membership-Hospitality Hospitality Tables & New entrance Bulletin/Table
- Greeters/Breeze Sign Ups. LFFD coordinated greeters/sign-up; Bonnie Rankin; Ami Hughes; Rick Warner; Nancy Kaelin; Caroline Snow; Rose Lerer, Sue Yates-Scott; John Schneider were the greeters throughout the year.

2. Worship and Chapel

- Worship Services: Collaborated or Led with Rev. Ellen Spero-Rowse, Interim Music Director, Brian Snow and Committees on monthly Interger Services. Including For All Ages Storytelling and Embodied Worship. E.g.: Thanksgiving; Advent Evening Service; Solstice; Justice; Love Interger; Green Committee; Mother's Day; LFF/REFF Appreciation Sunday; Flower Communion
- Co-Coordinated: Ingathering Service Collection/Delivery to Food Pantry
- Chapel Sundays Monthly followed REFF UU Themes and Soul Matters Themes

3. "RE" Faith Formation Programs: Pre-K through High School

2025-26 REFF Curriculum: "All About Us" (by learning all about yoUU) LFF follows a three-years spiral cycle whose themes are 'ME', 'UUs', 'WE'. This year we explored "all about 'UU'" "We Are Unitarian Universalists" <https://vimeo.com/344862790> Curriculum included Soul Matters, Flourishing Congregation Resources, UU Faith Practices and wherever our Imaginations and our stories took us... intentionally integrating embodied practices. Also, transitioning by integrating the new UUA Covenant as part of the prior UUA Covenant, Principles and Values.

- K to 12th: One Room Chapel
- High School Room no participants (occasional special church events)
- Events E.g.: Halloween Parade/Trick-or-Treating in graveyard; Friendsgiving Potluck; Holiday Party; Holiday Pageant for Christmas Eve Early Service, The Nativity Pageant, "UU Style" Seder/Last Supper; Ice Cream Social; Chocolate Bunny Ritual; Egg Hunt; Movie Day; Field Day
- Participation in Worship
 - FPCC Covenant Reading, Chalice lighting; Call to Worship, All components and practices of LFF/REFF embodied Service
- Special/Social Justice Projects:
 - Soul Matters Resistance and Including "Amazing Generation" Book Social Media Literacy for Youth; Resources to families UU Trauma; "Let Freedom Read" Legislative Action against banning of books campaign.
 - Mitten Tree; Alternative Housing Organization; Ice Cream Social

The High School Youth:

- Specific participation: Liam (Artemis) W-J, as Nursery Staff; Aspen S. (OWL)
- Our Whole Lives (OWL): Cohort with neighboring UU Churches: Harvard, Groton, Littleton, Stow/Acton (physical location); Six Youth from FPCC participated; Twenty-Two in total of cohort
- Coming of Age (COA): We did not offer the program this year. Next time: 2026-2027

REFF Families:

Attendance on Sunday morning is about 8 to 10 children/youth joining weekly. Also, on occasion guests or grandchildren of members attended. REFF families and children are very involved in all areas of congregational life. There were sprinkles of youth & families participating in other general events, such as 'Freedom Rally's'; Joleene Doubner Spruce Up; Peace Walk and Jimmy Fund Walk; Holiday (Holy Donuts); WCC/LGBTQ Services, FPCC Grounds Spruce Up; Auction; etc.

Registered: Caten; Forestier; Judd; Meehan; Owen; Rawding; Sloan; Worthen-Johnston; Volk

REFF/FPCC Child Dedication: We had no congregational child dedications

4. Lifespan Faith Formation/"RE"FF Council

Co-lead with: Rosemary McMullin; Laura Nutter; Molly Rawding, Susan Woodmansee
RECouncil monthly meetings and dedication to volunteering throughout the year each at least once a month. LFFD organizes/coordinates and plans schedule and curriculum for program, including communication of program considering 'council' suggestions, ideas and feedback of RECouncil. Examples: Christmas Events Pageant, Ice Cream Social in February and other REFF Families Small Group Monthly Meetings and various other events.

LFF/REFF Council FYI Note:

- Jan-2022; RECouncil unanimously voted on merging LFF and REFF; for the purpose of budget and support with promotion/ideas and continuity of programs and FPCC Religious Education Charter update.
- Feb 2022. Standing Committee Approved official merger of programs LFF and REFF.

5. Administrative/Committees

Administration:

Staff Meeting; RECouncil; Standing Committee

- Coordinate communication about gatherings, and the gatherings
- Updated and Maintained Communication/Announcements: bulletin boards; social media; Misc. Admin
- LFF Website; Yodek (downstairs entry screen weekly)
- Building Bridges Meeting/Events attended/supported when possible
- Safety Committee Meetings
- Church Council
- Trained new Nursery Caregiver Lincoln G.
- New '26-'27 Small Group Facilitators: Beth Benoit and Laura Nutter

Nursery:

- Hiring protocols/training. Including assisting with set-up/breakdown of REFF Sunday Mornings.
- Staff: Liam (Artemis) WJ; Lincoln Goodwin
- There are two children that attend semi-regularly

Professional Development:

- Multiple Miscellaneous. Transitional UUA Workshops Online New Adopted '24 UUA Covenant

Congregational Administrator Annual Report, '25-26

The 2025-2026 church year was my first working full time – and it was certainly a busy one, with lots of personal and congregational changes.

Building use remained consistent, with the majority of outside use continuing to come from longterm/known renters, much like years past. I worked with the Standing Committee on a regular basis regarding inquiries from outside not-for-profit groups. The Building saw continued typical use by the church/congregation, with committee, worship, and community events filling out the calendar.

I acted as Sexton for the wedding of Doug and Andrea Long's son in July 2025, and for several memorial services for church members or their loved ones in May 2026, and June 2026. As somber as it is to fulfill that role, I am also honored that I can help make a difficult day a bit easier.

I regularly communicated with Walter as he kept on top of the many quirks and needs of our building; much appreciation to him for his time and dedication. I also continued my work with Joan Coyne regarding the church's website and online presence.

My increased hours this year allowed me to address committee/team requests or needs much more readily, with the office assisting the Stewardship Team with the annual pledge drive as needed; continuing to support the Treasurer, Collector, and Bookkeeper in their roles and transitions; and supporting HR as requested during the search for a new Music Director. I also continued as an ex-officio member of the Safety Committee this year; with my role acting mostly as a staff and building liaison assisting with and advising on ongoing projects.

This year, I also joined the Association of Unitarian Universalist Administrators, which has allowed me access to some wonderful professional development resources – which I hope to utilize greatly as I continue to serve this wonderful Congregation.

I am looking forward to the next year here, and what further changes it may bring. Thank you all!

Submitted respectfully and with gratitude,
Erica Clifford
Congregational Administrator

Building Report Year Ending June 2025

July 2025

1. Did monthly inspections (Fire extinguisher, first aid, AED, elevator phone checks, and drained drip tank).
2. Did quarterly testing of emergency lights.
3. Repaired the picnic table
4. Annual smoke detector and sprinkler testing.
5. Replace faulty Emergency light in Class room 1
6. Had dishwasher repaired

August

1. Did monthly inspections.
2. Had Vestry floor refinished
3. Had Vestry repainted
4. Replace box in the ground that contains the outside faucet in the front garden
5. Repaired two breaks in the water line.
6. Replaced the batteries in the AED units
7. Replaced batteries in emergency lights

September

1. Did monthly inspections.
2. Met with the National Grid for annual Gas inspection
3. Annual Fire extinguisher inspection.
4. Repaired fence around the playground
5. Had new high limit thermostats installed by plumbers.
6. Met with Historic District for approval of replacing the siding.
7. Removed A/C units
8. Annual backflow valve test on the sprinkler system by the town.
9. Replaced box in the ground that contains the outside faucet in front lawn
10. Removed the grass in front of the Gate to the playground and replaced it with wood chips
11. Fire extinguisher annual inspection

October

1. Did monthly inspections.
2. Replaced weather stripping on the front door.
3. Straighten gate to the playground
4. Spray painted playground gate.
5. Met with Insure company inspector.
6. Met with Roofing contractor for estimate to correct the raised slate shingles.
7. Had 2 upstairs bathroom ceilings repaired and painted.
8. Annual Elevator inspection by the State of Massachusetts.
9. Annual boiler maintenance by plumbers.

November

1. Did monthly inspections.
2. Met with plumbers regarding no heat
3. Met with electrician for an electrical inspection required by insurance company.
4. Drained outside water line.

December

1. Did monthly inspections.
2. Restocked ice melt for the season
3. Went to Historic District Commission for an extension on when we would have the siding completed
4. Did a test of the emergency lights

January 2026

1. Did monthly inspections.
2. Installed thermostat cover in Sanctuary
3. Replaced Emergency light second floor
4. Replace battery in clock in the vestry.
5. Contacted structural engineers
6. Contacted the Building dept. and the Historic district looking for building plans of the Church.
7. Met with the Insurance Boiler inspector.

February

1. Did monthly inspections.
2. Replaced water filters in water fountains

March

1. Did monthly inspections.
2. Lubricated the back door latch
3. Met with the structural engineer to assess the roof problem.
4. Replaced balusters on back stairs.
5. Replace door stop for chapel door.
6. Changed sanctuary clock Daylight Saving time

April

1. Did monthly inspections.
2. Had Kitchen Hood inspected
3. Install door closer
4. Repaired Little Acorn sign post

May

1. Did monthly inspections.
2. Clean mini split units
3. Install air conditioners in parlor and Wight room

June

1. Did monthly inspections.
2. Met with T-mobile for upgrading cell tower in July
3. Met with the Audio/visual company for estimates to upgrade our equipment
4. Repaired bench
5. Installed bike rack

Submitted by: Walter Cole, Ron Cook, and Tip Rawding

Council in Faith in Action Ministries (CFAM) Annual Report 2025 – 2026

The Council of Faith in Action Ministries (CFAM) is made up of people who are active in Social Action at First Parish, either individually or in committees. Our committee provides support for the social action groups that don't belong to a committee such as Community Table and Open Pantry. We also help members who have an idea for a social action event or project organize their event.

We had a successful year with Split the plate. We would like to thank the whole congregation for their generous donation to all of our charities. We donated to 7 split the plate organizations:

- Merrimack Valley Project
- Alternative House
- Sanctuary Campus
- The Trevor Project
- Multifaith Antiracism, Change & Healing (MARCH)
- Merrimack River Watershed Council
- International Power and Light

Additionally, the church also donated the entire plate to Table of Plenty at Thanksgiving. CFAM also supported the efforts of Rapid Response Team and staffed a table in Social Hour to collect names of volunteers for the Rapid Response Team.

Respectfully submitted,
Joan Coyne, CFAM

Green Committee Annual Report 2025 – 2026

During the 2025–2026 church year, the Green Committee worked to reduce First Parish Chelmsford's environmental impact, improve church practices, educate the congregation, and strengthen relationships with local environmental and justice organizations. We also made progress on identifying 5 areas of focus for our 2030 Green Sanctuary program actions:

- Connected Congregation
- Greater Lowell Climate Justice
- Greener Church
- Joyful & Sustainable Events
- Resilience Hub

A major accomplishment was the installation of a new bicycle rack, supporting health, lower-carbon transportation, and making the church more accessible to cyclists. We also continued efforts to reduce unnecessary electricity use by turning off worship equipment between Sundays. Because of concerns that shutting down the equipment could affect the church network, Diana and Dolores are testing the process over the summer and gathering data to help establish a reliable procedure.

The committee addressed the ongoing issue of the church's inefficient heating system. Because the heating system for the entire office, chapel and classroom wing was on one zone, regulated by a thermostat on the first floor, the second floor would get uncomfortably warm, so much so that folks would have to open windows in the middle of the winter. Now there are multiple heating zones and the rooms on the second floor each have their own thermostats, providing improved comfort and increased efficiency of our heating system. Special thanks to Walter Cole, who managed this and several of our efforts!

Coffee hour practices also became more sustainable and inclusive in conjunction with the Ben Franklin Brigade. Funding changes allowed for healthier snacks, nondairy milk alternatives, and more socially responsible coffee. We added a recycling bin alongside the existing compost bin, posted clear waste-sorting instructions, and created guidance for maintaining and disposing of reusable mugs. We are still working through challenges related to spoilage, cost, and purchasing logistics.

The Earth Day Fair and worship service expanded our support for local justice and environmental organizations. Mill City Grows received a Faith in Action grant, and the Merrimack River Watershed Council received our April Share the Plate. We also began regularly promoting community events in the church newsletter, announcements, and bulletin boards. Committee members attended programs hosted by Mill City Grows, Tyngsborough Sustainability Committee, and the Lowell Parks & Conservation Trust, and hosted an information table at the Chelmsford Fall Festival and Holiday Prelude events.

Educational activities included a worship service on nuclear energy, teaching our youth about recycling, and a Faith in Action grant supporting a public screening of Plastic People at the Chelmsford Public Library. Our Earth Day Fair also included plant-forward diet information, and education on sustainable home products and services.

To encourage biodiversity, we partnered with a local bluebird conservation expert and gardener to distribute free native plant seeds on three Sundays and provide education about native plant propagation. We also donated native seeds and an hour of native plant education to the church auction.

Finally, the committee revived the Jolene Dubner Park Cleanup Day in Lowell. Volunteers removed trash and invasive plants in collaboration with the Lowell Parks & Conservation Trust, renewing a valued service tradition and strengthening an important community relationship.

We are grateful to everyone who volunteered, attended programs, supported community partners, planted seeds, sorted coffee hour waste, or helped First Parish move toward a more sustainable, just, and resilient future.

Grounds Annual Report 2025 – 2026

Thank you to Bob Morse, Paul Buckley, Joseph (Tip) Rawding, Andrew and Finn Worthen. Last year's Lawn Maintenance Stewards stepped forward for this year's team. There is always room for more.

Thank you to Deb Grad Kathy Talbot, Leslie Yaukoos, Diana Keohane, Molly Rawding and Family, Nancy Kaelin, Martha Orr Sherburne. Last year's Adopt a Plot Team transitioned into this year's Team too. There is room for a few more. Sign up! We would love to have you !

Curious as to what we do? Speak to any of our Stewards or contact Martha Orr Sherburne (Chair)

Our Lawn Maintenance Team did a wonderful job maintaining our lawn for all events and into the current fiscal year. Adopt a Plot Team members have done the same. We are carrying our work into the current year. We are also looking to make more room in the shed by donating or getting rid of a snow blower, and our first electric mower. Contact Martha for info.

Our wet, soggy, late start this year turned out ready for the 4th of July Festivities. Thank you to everyone who helped make it happen. A wonderful job ! As we head to the 4th of July in the current fiscal year Adopt a Plot Stewards may have to don Winter clothing underneath foul weather gear in order to be ready early enough. A special thank you to all who helped to get us ready on time.

We were able to put down 8 yds of bark mulch this year. Any excess will be stored on the grounds for use in the future. I don't anticipate adding any more in the current fiscal year we are in.

Martha Orr Sherburne, Chair: Prairie7dog7@gmail.com

Membership-Hospitality Committee Annual Report 2025-2026

Committee monthly meetings 2nd Wednesdays.

Membership-Hospitality Committee co-chaired by members: Carla Corey; Frans Janssen, John Fisher, Amanda MacLean; Elaine Mahoney; Chris Sweetnam, Leslie Yauckoes; Dolores, LFFD (oversee committee on their behalf)

Church life seemed to flourish this year. We had many individuals and families exploring and seeking a community with Unitarian Universalist values and beliefs. Societal uncertainties seem to have created an opportunity for more interest aligned with Unitarian Universalist Principles. The committee as a whole made great efforts and strides to make sure these seekers felt welcomed and informed at First Parish. This committee works as a team and strives to follow and fulfill the guidelines of the Committee's Charter throughout the year in addition to welcoming newcomers, friends and guests during social hour and beyond.

- The committee hosted the Annual Welcome! Potluck/Fall; Winter Holiday/December Pizza Meet and Greet as part of evening Advent Evening Services; Two Newcomers Meet & Greet in winter and spring that included FPCC Tours. Bonnie Rankin led the winter one and Amanda MacLean the spring one. (Note: no participants attended spring Meet & Greet)
- New UU Course: March 14th. Co-lead Amanda MacLean, Elaine Mahoney, and Dolores, LFFD. Held as a one-day retreat, feedback pleasant and successful. Luncheon offered during retreat, well represented by church committee members: Standing Committee, Green Committee, WCC Committee, Music Committee, Pastoral Care, Safety Committee, Worship Committee.
 - New UU Participants: Timothy Williams; Monica Lundberg; Mark Harris; Andrea Greenwood; Mary Twombly; Steven Davis; Matthew Zimmermann
- New Members: Steven Davis, Ron Peacetree, Matthew Zimmermann; Monica Lundberg
- Intergenerational Membership Service May 3rd. Recognized for time, treasure, talent & Love;
 - New Members '26: Ron Peacetree; Matthew Zimmermann; Kathleen Talbot; Steven Davis, Alan Sloan; Teri Ralbovsky (re-signed book)
 - Ten Years: Brian Snow
 - Twenty-Five Years: Sally Seekings, Rebecca Gore, Warren Flewellen
- In addition: Welcoming Announcements month of May '26, Host Bar Tables/Seating Table during Social Hour; Maintain/update resituated pamphlet rack; Welcome Table entrance of church with Committee Team Members Pictures

Respectfully Submitted,

Gratefully, Dolores GHeredia-Wood

Lifespan Faith Formation Director; *on behalf of Membership-Hospitality Committee*

Music Committee Annual Report 2025-2026

The Music Committee wants to express our deep appreciation for the Music Director Search Committee and congratulate them on hiring David Morochnick. Tom Coffey, Cindy Gist, Peggy Stephens-North, Janice Tervo, Jessica Volk, and Ellen Spero spent countless hours writing and updating the job description, advertising the position, and discerning what the Congregation needed. And of course, there was resume review, interviews, decisions, and FINALLY a contract. Congratulations and THANK YOU!

We also want to express our deep appreciation for Brian Snow, who stepped into the role of Interim Music Director this year when it became clear the search was going to take longer than originally expected. Brian's music brought much joy and energy into worship. Brian kept the Senior Choir going, and kept our instruments maintained. He has already been very helpful in bringing David up to speed on the resources available to him. Thank you Brian!

The Music Committee also wants to express our appreciation for ALL the choirs (Bell, Youth, and Senior), the Jam Band, and all the musicians whose performances enhanced our worship services during the past year. A piece that takes a few minutes during worship requires many hours of rehearsal in advance. Thank you all!

The Music Committee contributed to the Search Committee's Congregational Survey on our Music Program. The survey had a high participation rate, and elicited many thoughtful responses. The survey results made clear how important music is to our congregational life and confirmed the Search Committee was on the right track in evaluating candidates.

The Music Committee also seconded the Standing Committee plan to move forward with installing screens in the Sanctuary. These will give the Music Director more options in using the UUA Virtual Hymnal. They also will give Worship leaders the opportunity to incorporate visual elements into worship. Many local UU churches have incorporated screens in their sanctuary.

We note that our committee lost two long time members this year -- Lisa Calvo, to a happy relocation, and Alicia Page, who died this spring after a long illness. Both are missed. We welcomed Elaine Mahoney, whose energy and enthusiasm has been much appreciated.

The Music Committee's role is to support the Music Director. The committee is also responsible for preparing two budgets: one for maintaining the church's instruments, the other for the Music Director's use in acquiring new music, and hiring soloists and substitutes. We meet only a few times a year (when we have agenda items) at 8 am on a Sunday morning. If you would be interested in joining us, please contact Beth Benoit (bethbenoithome@gmail.com).

The Music Committee

Beth Benoit, Cindy Gist, Barry Jefferson, Elaine Mahoney, Henry Tervo, and Janice Tervo

Parish Affairs Annual Report 2025-2026

Sunday Social Hour: To make social hour a more sustainable and healthy event and also reduce the lift required to be a social hour host, this year Parish Affairs provided all coffee, tea and snack supplies. With input from the Green Committee, we sought to provide healthier, local, and socially responsible coffee, condiments and snacks. Hosting social hour can now be as simple as showing up early to get the coffee and hot water going, setting out the supplied condiments and snacks, and then cleaning up afterward.

We call the team of volunteers who host Sunday social hour “The Franklin Brigade.” This year, there were 29 “Brigaders” who hosted multiple social hours, including:

Matt Zimmerman	Bonnie Rankin	Marilyn Milano	Sue Yates-Scott
Rebecca Gore	Christina Cervantes	Tip Rawding	Stephanie Owen
Eliot Mayer	Melissa Sloan	Frances Killam	Linda Newhard
Neil Harmon	Ruth Whalen	Caroline Snow	Debra Grad
Amanda MacLean	Ami Hughes	Carla Corey	Jeanette Moreau
Nancy Kaelin	Gail Burati	Leila Pelosi	Cheryl Wilson
Molly Rawding	Brenda Rogers	Diana Keohane	Rosemary McMullin
Leslie Yauckoes			

In addition, the following individuals and committees or groups hosted a social hour:

Reverend Ellen	Lifetime Faith Formation/RE Council	Ann Marie’s Small Group
Kathy & Ron Deschenes	Welcoming Congregation	Men’s Small Group
Deirdre Shea & Frans Janssen	Stewardship	The Better Yeared Group

Together we helped strengthen our First Parish community by providing sustenance after every Sunday service to encourage members, friends and guests to spend some time socializing and getting to know each other more personally. We welcome everyone’s participation in this important effort.

In Community,
Diana Keohane
Sunday Social Hour Coordinator

Department of the Interior: Founded by the late Carlene Merrill, the Department of the Interior consists of several building stewards who work together to clean, organize and spruce up our worship and hospitality space. Thank you to this year’s building stewards for their hard work: Cindy Gist, Linda Newhard, Rose Lerer, Kathy Talbot, Walter Cole, Tip Rawding, Leslie Yaukoes, Diana Keohane and Deb Grad. Together we achieved the following:

- Spruced up, decluttered, organized and made our shared space welcoming;
- Cleaned the stairwell into the narthex;
- Cleaned the narthex and sanctuary and de-cluttered the pulpit and other areas;
- Purged and cleaned the refrigerator;
- Organized drawers and cabinets in the kitchen;
- Cleaned the chandelier lights.

The Department of the Interior invites you to join us twice a year to spruce up our building. Our first meeting takes place in early September, ahead of the new church year, to deep clean the kitchen, declutter, organize, and refresh our shared spaces. We meet again before the holiday season for chandelier cleaning and general housekeeping. This is a wonderful opportunity to work together and contribute to the stewardship of our church.

In Community,
Debra Grad
Department of the Interior Coordinator

Pastoral Care and Service Team Annual Report 2025-2026

This year we continued to host a table at social hour to create a presence and to also provide cards for folks who would like to send greetings, condolences, or best wishes to fellow congregants. The table also gives us a place to be more visible to folks who may want to check in or have a chat.

We said farewell and thank you to Liz Peterson who had been on our team for many years. And we happily welcomed Andrea Long and Rick Warner.

Erin Clifford and Kathy Deschenes continued to host Healing Conversations twice a month for those who are dealing with grief of all kinds including the state of the country.

Sandy Johnston and Linda Newhard continued to send cards to parishioners who need some support or are celebrating life events such as milestone birthdays, new homes, and welcoming new family members.

The team also sends dozens of Holiday cards to our members who might need a little joy.

The prayer shawl ministry has had its struggles but continues on. We want to thank all the knitters in the church who give so much of their time and talent to comfort those in need whether they are church members or not.

We kept in touch regularly with those who cannot make it to church by making phone calls and visiting, all in support of Ellen's pastoral care ministry.

At the beginning of the church year Ellen ran a morning training session for the team and continued to meet with us once a month.

Respectfully submitted,

The Pastoral Care and Service Team

Sandy Johnston, Cheryl Wilson, Rick Warner, Frans Janssen, Brian Snow, Maura Snow, Erin Clifford, Linda Newhard, Tom Coffey, Andrea Long, and Kathy Deschenes (Chair)

Safety Committee Annual Report 2025-2026

The Safety Committee held monthly meetings during the year except for July (2025), December (2025) and July (2026).

The committee continued to work and implement the recommendations of the security assessment that was performed by the Chelmsford Police Department in April of 2025. Funds were used from the committee's budget to purchase two way radios and software to monitor the church surveillance cameras. The two radios were to be used by the ushers for the Sunday services beginning with last September's Sunday morning services. A third usher (roamer) was also added to the service last fall to provide additional security. This usher would check all exterior doors to make sure that they were locked and secured during the service.

A Sunday morning safety service was held by the committee on October 5, 2025. The committee provided the congregation with what our mission was, and what was the purpose of the evacuation exercise. A feedback session was held after the drill.

One First Parish staff member, and three Safety Committee members were all certified as First Aid/AED/CPR and Narcan through the American Heart Association. The goal of the committee is to start a First Aid team at First Parish in the near future.

The Safety Committee also inventoried and purchased new first aid kits and other emergency supplies to be located in designated areas throughout the church building. A wheelchair and a walker were donated to First Parish to supplement our needs. These two items have been placed in critical areas to be ready to be used in an emergency situation as needed. All of these updates came about through the committee's walk through of the interior and the exterior of the church property this spring. Much continued improvement is to be continued in the near future.

Respectfully submitted:

Safety Committee: Erica Clifford (FP staff), Erin Clifford, Rebecca Gore, Dolores Heredia Wood (FP staff), Nancy Kaelin and Ron Deschenes, Chair.

Annual Report of the Standing Committee FY26

The Standing Committee has responsibility for First Parish's governance ministry. We serve as the church's governing board with responsibility for church finances, personnel, policies, communication, building maintenance and overall strategic direction. The Standing Committee is an integral part of our congregational polity reflecting our Unitarian Universalist values, with democratic governance being a core principle of our faith. Members of the Standing Committee in FY26 included: Gail Burati, Tom Coffey, Ron Deschenes, Rebecca Gore, Ami Hughes, Dave Kaffine, Colleen Leary, John Schneider, and Doug Snow.

Our major work in FY26 was to continue to rebound from the pandemic by advancing the church in several new directions identified during the Spirit of Life program launched in FY25. We adopted a "do now, build toward" framework to achieve some wins that will help advance First Parish.

Some of the year's highlights:

Our work focused on two areas recommended by the Spirit of Life team. The first was to improve external and internal communications and outreach. We established the "Building Bridges Project" to build toward a more robust external and internal communications program for First Parish. Under the leadership of Cheryl Wilson and Jeanette Moreau, many volunteers came together to develop a program to better promote First Parish and to open our doors to the community during local events. We also relaunched the Church Council, with invaluable support from Dolores, to provide church and committee leaders with a forum to exchange ideas, information, updates about committee activities, and approve Faith and Action grants. We also helped to recharge the Council of Faith and Action Ministry, along with Joan Coyne, Caroline Snow, and Monica Lundberg, to provide a clearinghouse and a resource for serving the community. And, as we look to expand our use of social media, we approved a social media policy to provide guidance to committees and staff on how to represent First Parish on social media platforms.

The second area of focus was on advancing some commonsense reforms to our financing. We began the year with a spectacular dinner to name the kitchen after Carlene Merrill and to launch a campaign to raise money for the Carlene Merrill fund to support our staff. This effort was supported by a \$20,000 anonymous matching gift that helped us meet our fundraising goal. We facilitated a fiscal summit that identified 43 suggestions we could make to improve our finances and established a Ways and Means taskforce that will lead a church-wide discussion in FY27 about how our finances align with our values and mission. We also presented a budget approved by the congregation that reflected the goals of the Standing Committee: increasing Erica Clifford's hours as our church administrator, providing funding to hire a music director, and ensuring a modest three percent COLA for our staff.

On a personal note, I want to thank Erica, Dolores, Susan (our bookkeeper) and Rev. Ellen for their support, advice, wisdom, and good cheer throughout the year. We are so very lucky to have such a strong staff team supporting First Parish. Finally, a special shoutout to Brian Snow who was ordained this year as a community minister while he stepped in to serve as our interim music director.

Thank you for the opportunity to serve as the Standing Committee chair.

Respectfully,
John R. Schneider

Stewardship Team Annual Report 2025-2026

The Stewardship Team kicked off our annual campaign during the March 15, 2026 worship service, with our theme of "Light the lantern; Be the signal light" to highlight how we serve as a beacon of hope, joy and social justice to our wider world. We talked about the reasons we give, and the spiritual practice of generosity as a regular and sustained extension of our values. We emphasized that investing in our church community is an act of faith.

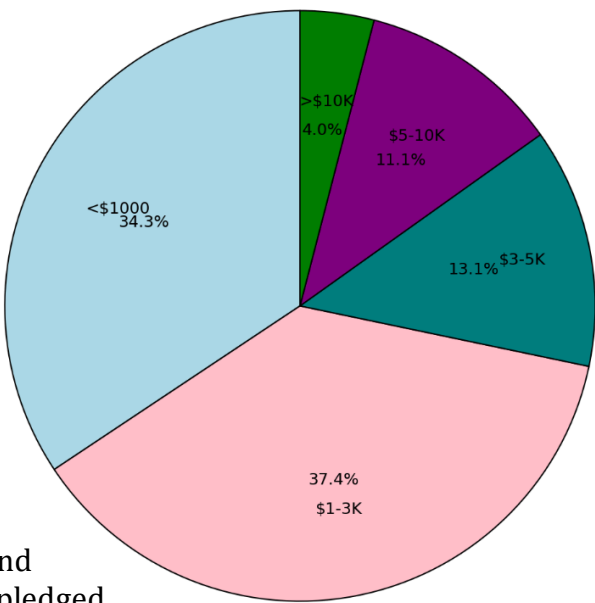
Our target was \$307,000, due primarily to a 16% increase in human resources costs in FY2027 as we expanded the scope of the Congregational Administrator’s role and made this a full time position (30 hours/week). As a result, the budget line for income from pledges was a larger increase than in past years. Increasing the number of pledging households is essential to meeting this aggressive goal. We fell short of our target, as the number of pledging households continued to trend downward, despite adding five new member households who pledged for the first time this year. We achieved an increase of 5% over last year, with pledges totaling \$276,495.

In our analysis, we noticed that while the average pledge continues to trend upward, over 35% of families pledged the same amount as the prior year(s). We wonder how to encourage and inspire these families to pledge more next year. In our current situation, a smaller number of members are shouldering an increasing cost of church operations and upkeep, especially with increased demand for staff to augment and take on responsibilities that were historically run by volunteers. We do not believe this trend is sustainable, and are looking at ways to engage the congregation about our financial health and stewardship throughout the year, not only for a few months each spring.

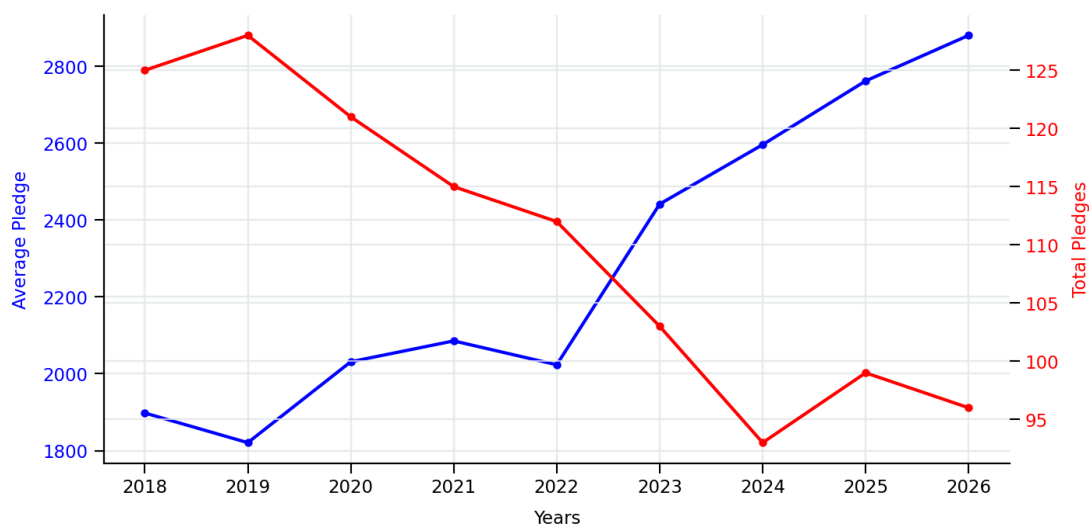
We are considering several adjustments. These include more education about what pledging is and entails, especially for those new to the church; a supplemental pledge drive in the fall; and relying less on on-line pledge forms while increasing conversations about pledging.

We are extremely grateful to Elaine, Teri, and Joanna for their support, to the Owens for their faithful stewardship of the process during prior years and their invaluable written guide, and Erica for her assistance throughout the campaign.

Pledging Unit Distribution



Pledge Trends



Website/Publicity Annual Report 2025-2026

Publicity

We did not do any publicity this year.

Website

Our focus for 2025/2026 was to work with Erica to make it easier for her to update the website. The primary change we made this year to help with this was to move our website from being self-hosted on DreamHost, to their managed WordPress product, DreamPress. With DreamPress, we have access to some support, and they manage all the Wordpress and Php updates. They also handle server-side security and automatic site backups so we don't have to.

We continue to host the sermons on the self-hosted site due to space concerns. DreamPress has limited server space, which is plenty for the site. The sermons are large though. They are all hosted on the uuchelmsford.net site, so the links on our regular site all point there. Dave Kaffine continues to post weekly sermons,

As chair, I would like to thank my committee for all the work they did this year. Members: Eliot Mayer, Barry Jefferson.

I'd also like to thank Dave Kaffine, who handles all the sermon posting both audio and video recordings. He's not a member of this committee, but he does all that work for us, and manages all those pages.

Respectfully submitted,
Joan Coyne
Chair

Welcoming Congregation Committee Annual Report 2025-2026

The Welcoming Congregation increased our outreach and collaborations with Chelmsford and surrounding communities this church year. We continued our relationship with the Chelmsford Diversity Equity and Inclusion Committee (a member of our committee occasionally attends DEIC meetings). We added a new member to our committee, Monica Lundberg, who has been an asset to our committee.

To support our local arts community and the Chelmsford Center for the Arts (CCA), we voted as a committee and agreed to continue our events at the CCA despite no longer receiving free room rental (we receive the non profit rental rate).

We collaborated with the DEIC on the Transgender Day of Remembrance (November 15, 2025) and the Transgender Day of Visibility Town Hall (March 29, 2026), both held at the CCA. Both events were well attended. We will continue to work with the DEIC next church year.

In Fall 2025, we applied for and received a Chelmsford Cultural Council grant for our Transgender Day of Visibility event to help fund our LGBTQ+ Boston PFLAG educational programming. Our TDOV Town Hall theme was Transgender and Nonbinary 101. Our panelists consisted of three individuals who do programming for PFLAG, our facilitator Tate Duffy, Elijah and Jo.

Overall numbers wise, TDOV was not as well attended this year, on the other hand we had a higher number of young adults than we have had in previous years. Additionally, we received a lot of positive feedback. Next church year we will assess and make tweaks to our process as necessary.

The committee hosted a church service on Polyamory in February during Side with Love month. This service was well received and many people came up to us after, thanking us for such a thought provoking service. We greatly appreciate the individuals who shared their Polyamorous truth with the congregation, without whom the service would not have been as successful, Carrie Fisher and Erin Shapleigh.

Additionally, we continue establishing relationships with the Welcoming Teams of Welcoming Religious Denominations in Chelmsford (Including Congregation Shalom, Trinity Lutheran, Aldersgate Methodist, The Congregational Church, and the Episcopal Church). We have all agreed we would like to collaborate more on events in the future. Our collaboration outreach has also extended to communities beyond Chelmsford including the Stow/Acton and Groton UU churches. Loraine Scampini from Groton, MA was especially helpful to our committee this year, and we intend to continue our relationship with her and the Groton Welcoming team next church year.

During the Church year, we tabled in the Vestry and participated in events on the Town Common (weather permitting). We participated in Chelmsford Pride and Lowell Pride (with stickers and informational resources, face painting, etc.). We also had a presence at a table during the NO King 3 Rally on the common.

Deirdre continues to post on our Facebook page and in our group to honor the special dates in the LGBTQ+ communities. We look for various ways to mark those dates. We welcome sharing from others. Our posts in support of the LGBTQIA+ community have been well-received. The Facebook posts are a way to reach out beyond the church.

The Committee continues to support the LGBTQ+ community by observing important dates, advocating on issues, and educating the congregation. We are always looking for new ways to do so. We welcome suggestions and new members who want to help us in that mission.

To better serve our committee and mitigate the risk of “burnout,” we have restructured the committee and will reevaluate the success sometime mid next church year.

Deirdre is stepping down as Chair, but we have decided not to have a typical full committee chair (which leads to burnout), but rather to divide the responsibilities:

1. EVENTS
 - a. PRIDE: Frances and mentor Gwen
 - b. TDOR: Warren and mentor Monica
 - c. TDOV: Deirdre (mentor someone?)
 - d. SERVICES?
2. OUTREACH
 - a. FACEBOOK presence: Deirdre
 - b. WEBSITE: Deirdre
 - c. TABLING/presence at church: Gwen
3. OTHER
 - a. SUPPLIES: Frances
 - b. Putting up the FLAGS/BANNERS: Warren
 - c. Creating Binder Resources: Gwen
4. Church-Wide Responsibilities
 - a. Annual Report: Deirdre
 - b. Budget: Frances
 - c. Flags/Banners request: Warren
 - d. Attending Church Council: Frances

Currently, our meetings are usually held on the third Sunday of the month, at 1 pm, on Google Meet, with occasional variations because of holiday weekends. We occasionally meet in person after church. We are planning to find a time to meet in August before the church year begins. If you'd like more information or to check us out, email welcoming@uuchelmsford.org, or see us during Social Hour.

Respectfully submitted,
Deirdre Heck (Chair)
Warren Flewellen
Frances Killam
Monica Lundberg
Gwen Meins
Abbie Ransdell
Kedar Thomas (TDOR only)

Annual Report of the Worship Committee 2025-2026

Music Director Search

Our search for Music Director took longer than we had hoped. Brian Snow took over as our interim Music Director for the year. He did a fantastic job bringing a variety of voices and musical styles to our services throughout the year. In June we were able to hire our new Music Director David Morochnick. He started in June 2025

Brian Snow's Ordination

In October we held a joyous celebration of Ordination for Brian Snow. He will be a Community Minister affiliated with First Parish. His ministry will be outside First Parish, but he will remain a member of the Pastoral Care Team.

Sanctuary A/V

We struggled this year to define what we needed for our Sanctuary A/V upgrades, and to be able to solicit bids so we could figure out how much it would cost. We hope to have something for the State of the SOciety meeting in the fall

Service Volunteers

We continue to schedule readers and chalice lighters for the fall and the spring ahead of time so that we are not scrambling the week of the service. That is working out well. Our Usher team added a third Usher on Sunday mornings for safety reasons. The third Usher stays outside the building and roams around the outside of the building rather than stays in the Sanctuary.

Respectfully Submitted,

Joan Coyne, Chair

Members: Aggie Brennan, Neil Harmon, Brian Snow, and Rick Warner