

2025 - 2026 Annual Reports

prepared for the

Annual Meeting Sunday, May 3, 2026

First Parish Unitarian Universalist
Arlington, Massachusetts

We choose to be
a liberal religious community,
welcoming to all.

We encourage each other
on our spiritual journeys,

support one another
through the changes in our lives,

and challenge
the excesses and injustices of our time.

Called to love
and upheld by joy,
We live our faith.

Mission adopted by a vote of the members of
First Parish Unitarian Universalist, in Arlington, Massachusetts, 2010

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Warrant for the Annual Meeting on Sunday, May 3, 2026

WARRANT

April 22, 2026

FIRST PARISH ANNUAL MEETING

To all members of First Parish Unitarian Universalist of Arlington, Massachusetts:

The Annual Meeting has been called at 11:30 AM on **Sunday, May 3, 2026**, at 630 Massachusetts Avenue in Arlington, Massachusetts. The meeting will be an in-person meeting in the sanctuary with a livestream on Zoom. Zoom attendees will be able to see and hear the meeting, but Zoom attendees will not be able to speak or vote. Zoom attendees do NOT need to register to attend. **If you would like to watch the Zoom livestream, you may do so by clicking here.**

Members empowered to vote by our bylaws are asked to decide the following at this meeting:

1. To receive the reports of the Officers, the Ministers, other staff, and the committees and organizations of the church.
2. To elect First Parish Officers and Standing Committee members. To recognize outgoing volunteer leaders.
3. To see if the members will make such appropriations as are recommended by the Parish Committee in a proposed budget for the fiscal year 2026-2027 and authorize expenditures under the control and direction of the Parish Committee, in accordance with the budget adopted.
4. To see if the members will authorize the Parish Committee to appoint lay and ministerial delegates to represent First Parish at meetings of the Unitarian Universalist Association and any other organizations requiring representation of the church.
5. To see if the members will elect a seven-person Settled Minister Search Committee from the published nominee pool, according to the adopted voting procedure, and said committee to be charged with conducting the search for and recommending a candidate to call as our Settled Lead Minister.
6. To hear oral updates from the Transition Team, the Corner Project Task Force, and the Reckoning & Repair Working Group based on reports submitted to the congregation.
7. To see and act upon any other business that may legally come before the meeting.

By vote of the Parish Committee, April 21, 2026, Marie Meteer (Chair), Kate Tranquada (Vice-Chair), Joanna Pushee (Clerk), Carolyn Hodges (Treasurer), John Anderson, Susan Moore, Amy Speare, and Allan Tosti.

This notice to all members of First Parish Unitarian Universalist of Arlington, Massachusetts, complies with our bylaws, as amended through May 15, 2016.

Appendix A

How will the Search Committee congregational vote be structured?

The congregation will vote on a 7-person committee at the Annual Meeting on May 3. The following procedures will govern the election of the Search Committee at the Annual Meeting:

- Only First Parish members may vote at the Annual Meeting.
- There is no proxy voting. Only in-person members may vote.
- No nominations for the search committee will be accepted on the floor at the Annual Meeting. The candidate pool has been formally established as published.
- Each member may cast votes for no more than 4 candidates.
- The highest vote-getters from the 11 nominees will serve on the search committee. However, if the Parish Committee determines that the committee lacks representational balance, it may replace the 6th and 7th highest vote-getters with appointed candidates from the remaining pool.

It is the Parish Committee's hope that the top 7 voted candidates chosen by members will naturally form a balanced team. However, the Parish Committee reserves the option to select the remaining 2 members. Such appointments are important and are considered as part of the process to ensure broad congregational representation on the search team (age, tenure, roles, skills, representation, gender, etc.). The Parish Committee will not appoint members outside the 11-person candidate pool.

Appendix B

Settled Minister Search Committee Job Description



The objective of the Settled Minister Search Committee is to accurately and positively represent the congregation to potential applicants, review applicants and narrow selections following the UUA process, and present the congregation with a single candidate that they believe meets the needs of the congregation in advance of the vote at the Annual Meeting.

Overview

The overarching goal of the search committee is to identify the best candidate for the new Settled Minister and bring them to the congregation for approval. There are many stages of this process:

- **Congregational input:** Develop and maintain the trust of the congregation. Conduct surveys and small group discussions to get input from the congregation on who we are, reflect on our ministries now and in the past, and explore how we see our future. (May - Oct.)
- **Create the Search Profile and Documents Packet:** These materials provide applicant ministers concrete information about the congregation, not just the contractual terms and congregational documents (covenant, minutes from congregational and governing board meetings), but a clear view of who we are. (Sept - Nov.)
- **Work with the Parish Committee to establish the terms of the offer:** compensation range, benefits and other contractual elements. (Sept - Oct.)
- **Reviewing candidates:** Depending upon the number of applicants, review applications, with interviews where appropriate with the goal of identifying the top 3 “Pre-candidates” and then conduct intensive weekend long interviews of those candidates.
- **Selection:** Determine the top candidate and participate in negotiations.
- **Presentation and Welcoming:** Coordinate events over a week to introduce the candidate to the congregation and if there is a strong positive vote at the Annual Meeting, welcoming our new Settled Minister to the congregation.

While 7 members will contribute in some way to all of the tasks, different people will take the lead on specific tasks with some other members supporting the work. Throughout, different individuals will also take on key roles: leading the overall process, communicating with the Parish Committee and congregation, compiling data, managing the documents representing First Parish to candidates (including the website), and managing the finances (particularly during the interviewing stage). Not all searches have successful results, despite best efforts of the search committee. If a candidate that fits our needs isn't found or isn't accepted, there will be additional efforts, including hiring a contract minister or continuing the Transition. The Search Committee reports to the Parish Committee and will provide regular updates at the Parish Committee meetings. They will be coordinating with the Transition Team and Interim Lead Minister.

Parish Committee and Staff Reports

Parish Committee

Contact: parcom-members@firstparish.info

Purpose/Mission: The Parish Committee (“ParCom”) is the governing board of First Parish and is responsible for providing leadership and vision, creating policies, and managing the affairs of First Parish in service to its mission. Other tasks include prioritizing expenditures, developing the annual budget for congregational approval, monitoring finances, and planning the annual meeting.

Chair: Marie Meteer

Committee members:

- Marie Meteer (Chair): First term ends 2028
- Kate Tranquada (Vice-Chair): First term ends 2027
- Joanna Pushee (Clerk): Second term ends 2028
- Carolyn Hodges (Treasurer): Second term ends 2027
- John Anderson: First term ends 2026
- Susan Moore: Term ends 2026
- Amy Speare: First term ends 2028
- Allan Tosti: Second term ends 2027
- Board Member-at-Large (open position)

Major Activities

- Held retreat to identify four 2025–2026 priorities:
 - Inclusion and Accessibility in Worship
 - Communication and Marketing
 - The Engage Project
 - Develop a “Meetinghouse Corner Project”
- **Volunteer Engagement via the Engage Project:** In 2024–2025, ParCom supported volunteer engagement by developing Realm infrastructure. In summer 2025, the Engage task force (Susan Moore, Amy Speare, with helpers Kiki Giatis and Steve McMullin) set up a “profile and interests” feature. In the fall, Engage was launched and paired with a sermon by Rev. Jonipher. Committees have used Engage to identify members who might be interested in volunteering for a task or project. Religious Education, Stewardship, ParCom, and others have utilized this tool, resulting in finding enthusiastic volunteers.

- **Meetinghouse Corner Project:** In January 2025, the Parish Committee began brainstorming a way to combine the goals of constructively addressing the demise of the once-magnificent maple on the meetinghouse lawn, making the main entrance fully accessible, and honoring Rev. Marta Flanagan. A working group was formed and led by ParCom member Al Tosti, with Andrew Lenard as co-chair, and members Mark Wilke, Phil Speare, John Galantowicz, Peggy Gardiner, and Sanjay Newton. The group plans to apply for a Community Preservation Act (CPA) grant and is working with a landscape architect.
- Developed 2026-27 budget with Finance Committee for congregational approval
- Continued the Rose of Recognition to celebrate individuals and groups going above and beyond.

The Transition

- Hired and welcomed Rev. Dr. Jonipher Kwong as Interim Lead Minister.
- Approved contract for adjunct minister Rev. Emily Conger (covering Rev. Stevie's leave).
- Approved contract for adjunct minister Rev. Carolyn Patierno (covering Rev. Erica's sabbatical).
- Engaged in a Covenanting Process for a Parish Committee covenant addressing elected board members' relationships to each other, to the ministerial office, and to the congregation.
- Initiated the process of creating a ministerial search committee. A subcommittee led by Amy Speare created a job description and gathered recommendations from 224 members after contacting 340 members by phone banking and tabling at coffee hour. Confirmed a ballot of highly recommended and available candidates for a vote at the Annual Meeting.
- Supported the Transition Team with communication by helping develop the "In the Interim" and "Transition" web pages and bulletin board to serve as the home of newsletters, timelines, and other materials.
- Created messages and announcements with updates to the congregation on the inside candidate decision, the second minister's contract end date, and the Search Committee selection process.
- Received training in facilitating Listening Circles to assist the Transition Team in introducing this practice to First Parish, and assisted in initial rounds of circles.

Challenges and Opportunities for Improvement

- Build trust by improving clarity, channels, and cadence of communication.
- Propose a balanced budget in line with our Unitarian Universalist values.
- Manage maintenance and cleaning services needs for the meetinghouse and tenant.
- Ensure clear expectations for the relationship with our tenant, Adventures in Montessori (AIM).
- Manage conflict in an equitable and transparent fashion.

2026–2027 Priorities

- Support the Minister Search Committee in finding a successful candidate to bring to First Parish as new lead minister in 2027, including providing adequate orientation materials, job descriptions, and appropriate visibility for the seven members who serve on this deeply impactful team.
- Support the designated task force leading the process of Covenanting to ensure right relationships and healthy dialogue as the Transition continues into its second year.
- Work with the Transition Team to build trust, manage the ministry transition period with effective feedback structures, and maintain open dialogue with various demographics within the congregation.
- Continue to review alternative committee structures, volunteer pathways, and staffing support as congregational needs, demands on staff, the external environment, and congregants' work, family, and commitments continue to evolve.

Report: Lead Minister, Rev. Dr. Jonipher Kwong

Contact: jonipher.kwong@firstparish.info



The banner picture on our website's [transition page](#) of the three ministers and Worship Associate Loren Gomez during last Fall's Ingathering service/water communion is etched in my mind as the perfect way to launch our shared ministry. It has been such a pleasure working collaboratively with Revs. Erica and Stevie, clarifying our "[lanes](#)" including switching a few items around (e.g., adding adult faith formation to Rev. Stevie's portfolio) and making sure we keep each other in the loop at all times. I also leaned heavily on the retired ministers who are members of the congregation, a minister serving as a chaplain, and a candidate for ministry, forming a clergy advisory group that has been meeting monthly. There is so much collective wisdom amongst this group!

We also know ministry is not just the ministers' job, but is shared with lay leaders as well. We celebrated our first Leadership/Volunteer Sunday with moving testimonies from Worship Associates and Lay Ministers this spring about why they got involved. As First Parish continues to grow, it is sometimes tricky to figure out which role needs to be professionalized and what needs to stay volunteer-driven. One key area that needed attention for a while is how to support our virtual community. We hired an Audio/Visual Technician (big shout out to Jo Guthrie and Anne Quaadgras for your help) to ensure our services run smoothly and we give a break to those who have been doing this since the beginning of the pandemic lockdown.

We also restructured our custodial functions this year. And much more needs to be done to maintain our building (as you will read about in the [Property Committee's report](#)) and other administrative functions to support a congregation our size. A group of us including Marie Meter (chair of the Parish Committee), Carolyn Hodges (Treasurer), Kay Snowden (co-chair of the Transition Team) and I attended a training session held by the UUA called Sustaining Staffing Strategizers this past Spring to learn more about how to do so. The Transition Team also did some research with other congregations our size. During the upcoming months, we'll be having further conversations around our needs and what staffing structure would make the most sense for a congregation our size.

The Transition Team, which launched at the end of September, has been a key player in helping provide a space for these important discussions to take place. As their [report](#) will indicate, they have been busy hosting Listening Sessions, "Common Ground" start-up with the UUA, Listening Circles, and more! They have been my "eyes and ears" and thought partners on what goals to prioritize during the

interim period in addition to the five interim tasks of heritage, leadership, mission, connection, and future.

One of those priorities is coming up with a covenant of right relations. Amongst similarly sized congregations, First Parish is an outlier in terms of not having one. A covenant is helpful especially in times of conflict and disagreement. I worked with many groups so far to refresh their [covenants](#) and I'm excited a task force spearheaded by former Director of Religious Education Tina Schultz will help us come up with an overarching one. We hope you'll engage in this process moving forward.

We continue to have a very busy set of programming this year, with worship as our weekly anchor. We had a very vibrant December holiday season and added two additional services: "Day of the Dead" and the first "Winter Solstice" ritual in over two decades. We continue to experiment with various parts of the worship experience including ways to make it more inclusive and accessible. We launched a task force to continue to build up our technological infrastructure to support these efforts including holding some experiments during the summer.

Because we continue to live in challenging times, our social justice groups have been quite active. I had a chance to participate in "Prayers for Liberty" in September, "No Kings III" Rally where 1,000 people showed up at our front lawn this past Spring, Trans Day of Remembrance and Resilience in November, and many more as mentioned in the Social Justice Committee's report.

Behind the scenes, I have been working with our Human Resources Committee to revise our Employment Manual and address some of the issues brought up by staff, as mentioned in their report. Speaking of staffing transitions...we had two ministers go on leave this spring: Rev. Stevie's parental leave and Rev. Erica's sabbatical. We were so blessed to have two new adjunct ministers fill those roles temporarily—Rev. Emily Conger and Rev. Carolyn Patierno (respectively). It has been an honor working with these two beloved colleagues again.

If there's been a pattern I've observed so far as I dive deeper into the congregation's history, it has to do with how conflict is addressed and whether there's an intentional process of de-escalation or it just festers/lingers underground. I'm hoping we can begin to uncover and disrupt patterns that no longer serve you well and find ways to rebuild trust. Part of where the tension lies is around how decisions are made. I've introduced the "[RACI Chart](#)" to clarify who is responsible, accountable, consulted and informed before and after decisions are made. The Religious Education Committee already put this to use during Rev. Stevie's sabbatical.

Through it all, we have been fortunate to have the strong support of our UUA Regional Staff Hilary Allen, who facilitated a conversation with the Parish Committee and Transition Team in December, as well as facilitating the Common Ground event mentioned earlier. We have been in regular communication around so many key issues, including the ministerial search process.

Thank you all for your engagement during this interim period. We've accomplished a lot during a short period of time and there's more transformation to come!

Interdependently Yours,
Rev. Jonipher

Deaths at First Parish

- **Freda Flammer**

Member of First Parish and wife of Charlie Flammer,
Died March 8, 2025

- **Janet Blodgett**

Member of First Parish, died April 20, 2025

- **Lauren Nicole Winkler**

Granddaughter of Howard and Lenore Winkler,
Died April 30, 2025

- **Claire Tavilla**

Mother of Cindy Tavilla
Died May 4, 2025

- **Sharen Leonard**

Wife of Andrew Leonard, and member of First Parish,
Died June 17, 2025

- **Barbara Richmond Studwell**

Grandmother to Rev. Erica Richmond,
Died July 27, 2025

- **Joyce Flick**

Mother of Kiki Giatis,
Died August 26, 2025

- **Dick Terry**

Husband of Patience Terry, and member of First Parish,
Died September 5, 2025

Peter Southwick

Husband of Jean Rosenberg and father of Natalie Southwick and Lindsey Southwick,
and member of First Parish,
Died September 15, 2025

- **Katie Miller**

Sister of Tish Miller,
Died September 22, 2025

- **Dorothy Bouman**

Childhood UU religious education teacher of Katy McNeill,
Died October 4, 2025

- **Laurel Rodriguez**

Sister of Ellen Leigh,

Died October 19, 2025

• **Charles Jablonski**

Brother of Carolyn Hodges and brother-in-law of John Hodges, Died October 25, 2025

James Preston Bushman

Father of Jenise Aminoff,
Died December 22, 2025

Mary Lou Solliday

Member of First Parish,
Died January 28, 2026

Staff at First Parish Arlington MA, 2025 - 2026

Lead Minister	Rev. Dr. Jonipher Kwong (began 8/2025) (FT: Full Time)
Parish Minister	Rev. Erica Richmond (began 4/2020) (FT) <i>On sabbatical through April 1 - June 30, 2026</i>
Adjunct Minister	Rev. Carolyn Patierno (began 4/2026) (0.5 FT) <i>Serving during Rev. Erica's sabbatical April 1 - June 30, 2026</i>
Minister of Religious Education	Rev. Stevie Carmody (began 8/2023) (FT) <i>On parental leave January 15 - March 5 and April 15 - May 13</i>
Adjunct Director of Religious Education	Rev. Emily Conger (began 1/2026) (0.5 FT) <i>Serving during Rev. Stevie's parental leave Jan-Mar and Apr-May</i>
Youth Program Coordinator	K Milano (began 9/2025) (0.495 FT)
RE Assistant	Bella Jaffe (began 10/2024) (0.25 FT)
Office Manager	Ebiere Omoregie (began 4/2024) (FT)
Office and Communications Associate	Allison Sillers (began 09/2024) (0.7 FT)
Music Director	Dr. Daniel Parsley (began 11/2023) (0.5 FT)
Accompanist	Kenneth Seitz (began 9/2018) (0.3 FT) <i>Ken also serves as Music Director Emeritus</i>

In honor of those who joined as Members this year:

Seth Anderson
Mary Babic
Madeline Duke
Marc Fredette
Stephanie Galaitsi
Sandy Graff
Barbara Ives
Robert McKersie
Cecelia Michaelis
Peter Miller
Cindy ReVelle
Barbara Van Zoeren

Total membership as of Friday, May 1, 2026: 416

Report: Parish Minister, Rev. Erica Richmond

Contact: parishminister@firstparish.info

My sixth year at First Parish has been so full! We are in our first year of our interim period AND we are continuing the day-to-day tasks for taking care of one another and our world. All under the growing influence of fascism. It is a lot. I know folks are scared, grieving, and worried. We hold that tenderly as we also continue forward. Doing our part as we are able. I am immensely proud of the way we live our values in these challenging times.

With the arrival of our Interim Lead Minister, Rev. Dr. Jonipher Kwong, we have been engrossed with the tasks of interim work. Who does First Parish want to be? What has served us well and what has challenged us? I am glad for the wisdom that Rev. Jonipher has brought to our congregation. And I am grateful to our leadership as they pose these thoughtful questions.

All the while, my portfolio shifted to accommodate these new priorities. I am no longer overseeing Shared Ministry, but I am doing 90% of the pastoral care work. Of course, aided by the wonderful contributions of our volunteer Lay Ministers. I began my ministry career as a palliative care chaplain and pastoral care is one of my sources of deep meaning in this work. I am glad and grateful to be able to provide consistent spiritual support to our congregation.

This Fall, we lost two stalwart members of our congregation: Dick Terry died on September 5, 2025 and Peter Southwick died on September 13, 2025. It was an honor to work with each person and their family. I am grateful for the ways we keep Dick and Peter's legacies alive within our congregation. This Winter, two more members of our congregation passed, Mary Lou Soliday and Pat MaGee. Mary Lou had been a member for ten years and Pat for thirty plus. Many others in our congregation have lost loved ones this year and grief has been accompanying us in all that we do.

In addition to Lay Ministry, I continue to oversee the Membership Committee, Stewardship, and our many Social Justice initiatives.

1

This year, Membership tried new strategies to help welcome and integrate folks into our congregation. After canceling our traditional New UU class in the fall due to low sign-ups, the Committee experimented with drop-in workshops after worship. We are following a trend of several other congregations, trying to connect with people at times when they are more available. For example, Membership has offered a once a month Zoom session on the book, *Love at the Center*, an anthology of UU theology. We were able to appeal to parents of young

children by offering a virtual option on a weekday.

This year, we are welcoming 12 new members to First Parish:

Seth Anderson
Mary Babic
Madeline Duke
Marc Fredette
Stephanie Galaitsi
Sandy Graff
Barbara Ives
Robert McKersie
Cecelia Michaelis
Peter Miller
Cindy ReVelle
Barbara Van Zoeren

Stewardship had an ambitious goal this year. We are aiming to raise \$840,000 in pledges. And again, we tried different ways to do this. We connected with committee chairs asking for their help in reaching committee members. We are hoping that hearing about the importance of pledging will be more inspiring coming from leaders that folks already know and connect with. We continued with successful events such as the congregational lunch, RE family game night, and pizza for parents of teens. I am very grateful to the hard work of our Stewardship chair, Joel Carlton-Gysan.

2

Our justice initiatives have been energized and strategic this year. Our Reckoning and Repair group chose to partner with the Roxbury Youth Program, an initiative of the UU Urban Ministry. This is making our commitment to both financial and relational reparations real. We fundraised in the Fall and this February (2026) donated an initial amount of \$27,000 to the Roxbury Youth Program. Other justice initiatives are equally as involved! Of note, our Defending Democracy Working Group has followed through on its commitment to prioritize interfaith, public witness work. We hosted a vigil for Renee Good and other victims of ICE violence in January and we hosted No Kings III on March 28th, with 1,000 people participating.

Overall, I have seen more intentionality when it comes to Committee work this year. Folks at First Parish are claiming our strengths and curating our efforts around them. For example, the LGBTQIA+ Affirming Committee has repeatedly partnered with the town's Rainbow Commission on annual events. We have a trusted relationship with them and it allows for more broad-based and diverse offerings.

From my perspective, many things have crystallized within my portfolio this past year. Years of relationship building and intentional planning have come to fruition. I am grateful for all the work we have done together.

This year also marks my Sabbatical. After five years of work, I am eligible for a month per year of service. Part One of my Sabbatical is April 1- June 30th. And Part Two is October-November, 2026. I am grateful to Rev. Carolyn Patierno who will be providing part-time coverage during that time.

For all that we do, for all that we value, we say, amen and blessed be.

In faith,
Rev. Erica Richmond
Parish Minister, First Parish of Arlington, MA

Report: Office Manager, Ebiere Omoregie

Contact: officemanager@firstparish.info

April 6 of this year marked my two-year anniversary with this devoted and wonderful congregation. Throughout these past two years, there have been a number of changes in administration and staffing, all of which have strengthened my ability to adapt, learn, and navigate effectively within a rapidly changing environment.

In November, First Parish made a transitional change in custodial staffing in order to better meet the needs of the congregation as a whole. After three years of working with our previous Sexton, Jacqueline Dejesus, we began a pilot period with Moulaz Cleaning Services. Moulaz provided First Parish with a level of cleaning service that we had not experienced in recent years. During that pilot period, we also explored additional services that would better align with our needs and mission to the wider community.

At last, we successfully onboarded City Wide Solutions. City Wide offers a variety of services, including light maintenance and broader facility support, helping us better care for our building and grounds.

With the help of our wonderful Office and Communications Associate, Allison Sillers, we have been able to move gracefully through yet another busy year. Between payroll changes, onboarding processes, and rental management, we have continued serving the congregation while also seeking ways to strengthen and expand overall office administration.

A special note of appreciation to Allison for consistently stepping in, taking initiative, and sharing her expertise in many areas of our clerical work. Looking ahead, Allison is currently in nursing school and has shared that she anticipates departing First Parish sometime between June and September of 2027.

First Parish by the Numbers

Highlights in the Life of First Parish since 2009

2009-2010

- Marta Flanagan installed as minister; Joan Dyer begins as Office Administrator
- A renewed Lay Ministry program launched
- Begin “Embrace the Darkness” worship service and senior blessings
- Tina Schultz is serving in 15th year as Director of Religious Education, Laura Prichard in 7th year, Marcie Griffith in 3rd year as Youth Program Coordinator

2010-2011

- Worship Associate program launched
- Congregation votes to become an environmentally responsible “Green Sanctuary”
- Lectio Divina programming is introduced

2011-2012

- “Action for Economic Justice” begins as a social justice working group in response to Occupy Wall Street
- First Trip to Partner Church in Gagy, Romania

2012-2013

- First website launched
- Capital campaign raises 1.9 million pledge dollars toward renovations

2013-2014

- Solar panels installed
- Ken Seitz serves as Interim Music Director after departure of Laura Prichard • Rev. Ken Sawyer is Sabbatical Minister during Marta Flanagan’s 4-month sabbatical
- Marcie Griffith completes 7 years as Youth Program Coordinator

2014-2015

- Capital campaign construction and rededication of renovated Parish areas
- A “Black Lives Matter” banner goes up on meetinghouse lawn after a grand jury vote not to indict Darren Wilson of killing Michael Brown in Ferguson, Missouri
- Worship Survey reveals members are evenly split between humanism and theism
- First database created (REALM)
- Jonathan Brennand begins as Music Director
- Sarah Napoline serves as Youth Program Coordinator

2015-2016

- Stewardship Campaign adopts theme of “Turning Outward”
- Social Justice Working Groups sponsor numerous programs on classism and on mass incarceration
- Executive Assistant half time position established to assist minister
- Stevie Carmody becomes Youth Program Coordinator

2016-2017

- More than 100 members attended the Women’s March in Boston the day after the inauguration of President Trump
- “ArCS,” initiated by First Parish members in response to the Syrian refugee crisis, begins work hosting asylum seekers

- The Parish Committee establishes the Racial Justice Coordinating Committee
- “Action Sunday” launched as part of “Turning Outward”

2017-2018

- 10 percent of the congregation participates in racial justice programming including “Unpacking Whiteness”
- Congregation ordains both Wendy Page and Aisha Ansano as ministers
- Stevie Carmody completes 3 years of service as Youth Program Coordinator

2018-2019

- Revs. Jeanne and Olav Nieuwejaar serve as sabbatical co-ministers while Marta Flanagan takes a 4-month sabbatical featuring a trip to South Africa
- Aisha Ansano serves as Youth Program Coordinator
- Campaign for a second minister start up fund raises more \$200,000 in pledges

2019-2020

- A global pandemic closes the meetinghouse on March 13.
- worship and activities begin online.
- Chloe Briede serves as our first intern in more than 15 years
- Rose Sawyer Marsh begins serving as Youth Program Coordinator
- Congregation ordains Stevie Carmody to the Unitarian Universalist Ministry
- Parish Committee hires Rev. Erica Richmond as Parish Minister to join Marta Flanagan, Lead Minister, starting in August 2020

2020-2021

- A pandemic moves worship and all activities online or outdoors through summer 2021. From the sanctuary Foodlink distributes food to local food pantries.
- To meet the need for human connection amidst the isolation of a pandemic, adult programming opportunities increase. Attendance in worship and adult programs are stronger than in previous years. Pledging for 2021-22 increases by ten percent.
- The death of George Floyd on May 25, 2020, sparks demonstrations and greater awareness of police abuses. First Parish hosts demonstrations and related education programming.
- Rev. Erica Richmond begins as Parish Minister joining Marta Flanagan as Lead Minister.
- Sara Hidalgo begins as Office Manager.

2021-2022

- We begin hybrid worship on November 14th, moving from being strictly online to having some folks worship incarnate and some who have continued via Zoom.
- The ongoing need for flexibility and support continues as the impact of the pandemic remains unceasing
- Adult programming and justice-based initiatives continue to strengthen and become a focal point of the congregation’s energies.
- Rev. Marta Flanagan goes on Sabbatical from January 1st-May 15th.
- During that time, Rev. Erica Richmond steps into the role of acting lead minister and Rev. Marc Fredette joins the team as a part-time adjunct Sabbatical minister.

2022-2023

- Tina Schultz announces her retirement as Director of Religious Education beginning June 2023. Tina is celebrated for her 27 years as DRE
- The Parish Committee hires Rev. Stevie Carmody as Minister of Religious Education to begin in August 2023

2023-2024

- Ebiere Omoregie begins as Office Manager in April 2024.

- In June the Parish Committee hired Daniel Parsley, who had been our interim Music Director for six months, to be our settled Music Director.

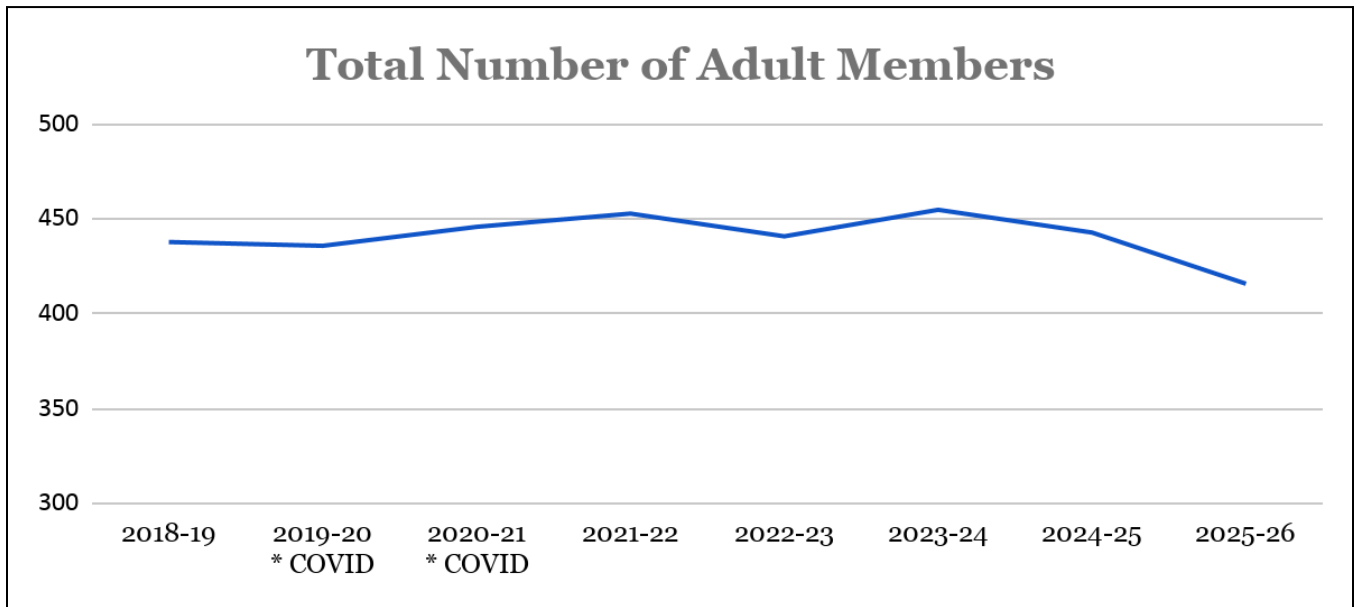
2024 - 2025

- In January, Parish Minister Rev. Erica Richmond and her husband welcomed a baby and Rev. Erica left for parental leave. Rev. Tricia Brennan joined First Parish as Adjunct Minister during Rev. Erica's parental leave in the winter and spring of 2025.
- In November, Rev. Marta Flanagan announced her retirement from parish ministry at the end of the church year.
- An Interim Search Committee is formed and begins the work of searching for a new interim lead minister.
- Rev. Dr. Jonipher Kwong is announced as the Interim Lead Minister, set to begin his term in Summer 2025.
- Rose Sawyer-Marsh announced her departure in June from First Parish after six years of service as Youth Program Coordinator.
- Rev. Marta Flanagan retires from First Parish in June 2025, following a month of goodbyes and celebrations.

2025 - 2026

- Rev. Dr. Jonipher Kwong began his two-year term as Interim Lead Minister in August.
- K Milano joined First Parish as Youth Program Coordinator in September 2026.
- Rev. Stevie Carmody, Minister of Religious Education, and his wife welcomed a new baby in January and Rev. Stevie took parental leave (divided into two terms from January to March, and April to May).
- First Parish hosted Arlington's first No Kings Rally, in partnership with Indivisible L.A.B. on March 28, 2026. An estimated 3000 people gathered on the First Parish lawn and grounds to protest the Trump administration's executive overreach and military, immigration, and policing policies. Later that day many First Parish members participated in the Boston No Kings Rally downtown.
- Rev. Erica Richmond, Parish Minister, went on sabbatical from April through June of 2026.

Membership



	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
		* COVID	* COVID					
number of full (non associate) members as of May 1	438	436	446	453	441	455	443	417
number of full members who joined this program year	16	7	19	11	12	18	21	12
number of youth who joined as associate members this program year	0	0	1	0	0	0	0	0
percent change in membership over prior year	-0.46%	-0.46%	2.24%	1.55%	-2.72%	3.08%	-2.64%	-6.09%

Sunday Worship Attendance

Average total Sunday attendance decreased by 10% over last year
(Median total attendance decreased by 9%)

Average attendance in the Sanctuary decreased by 9% over last year
(Median in-person attendance decreased by 11%)

Pre-Covid (average Sunday attendance 2016-2020): 238

COVID Zoom only (2020-2021): 200

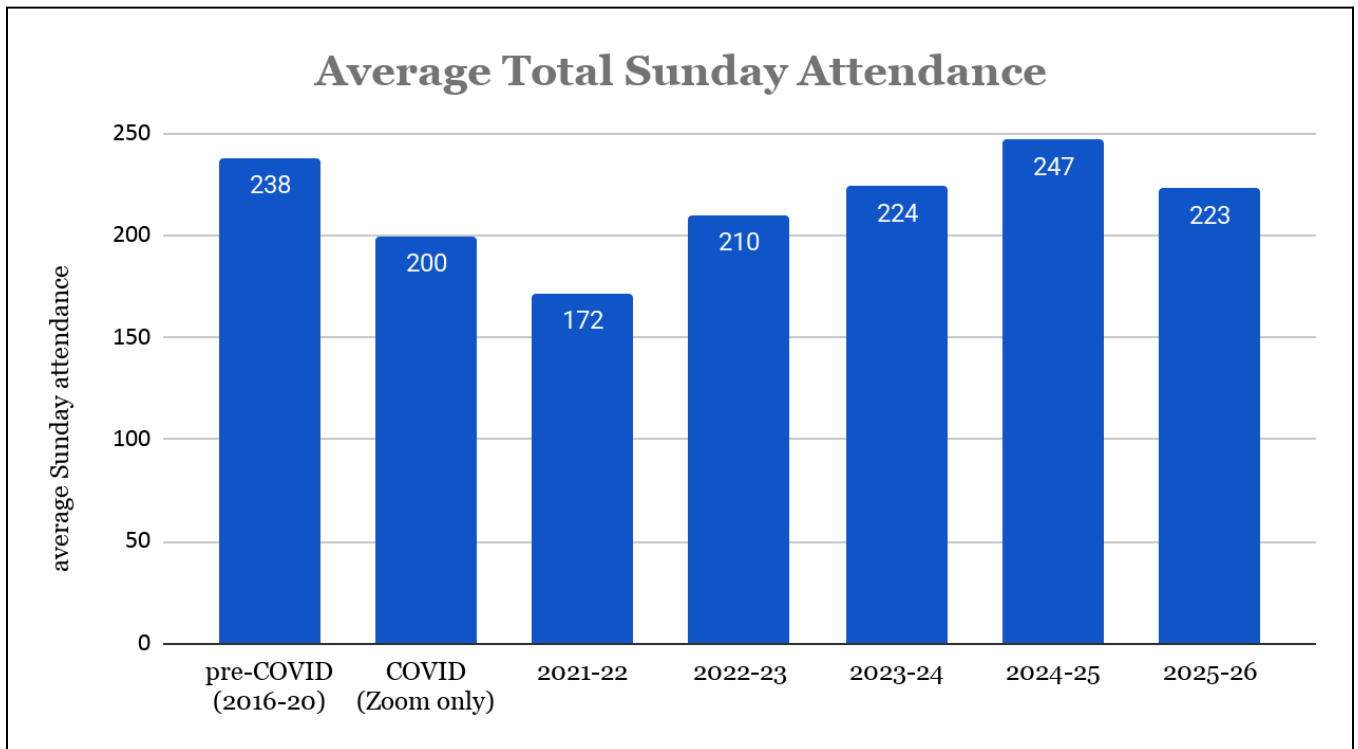
Average total Attendance 2021-2022: 172

Average total Attendance 2022-2023: 210

Average total attendance 2023-2024: 224

Average total attendance 2024-2025: 247

Average total attendance 2025 - 2026: 213



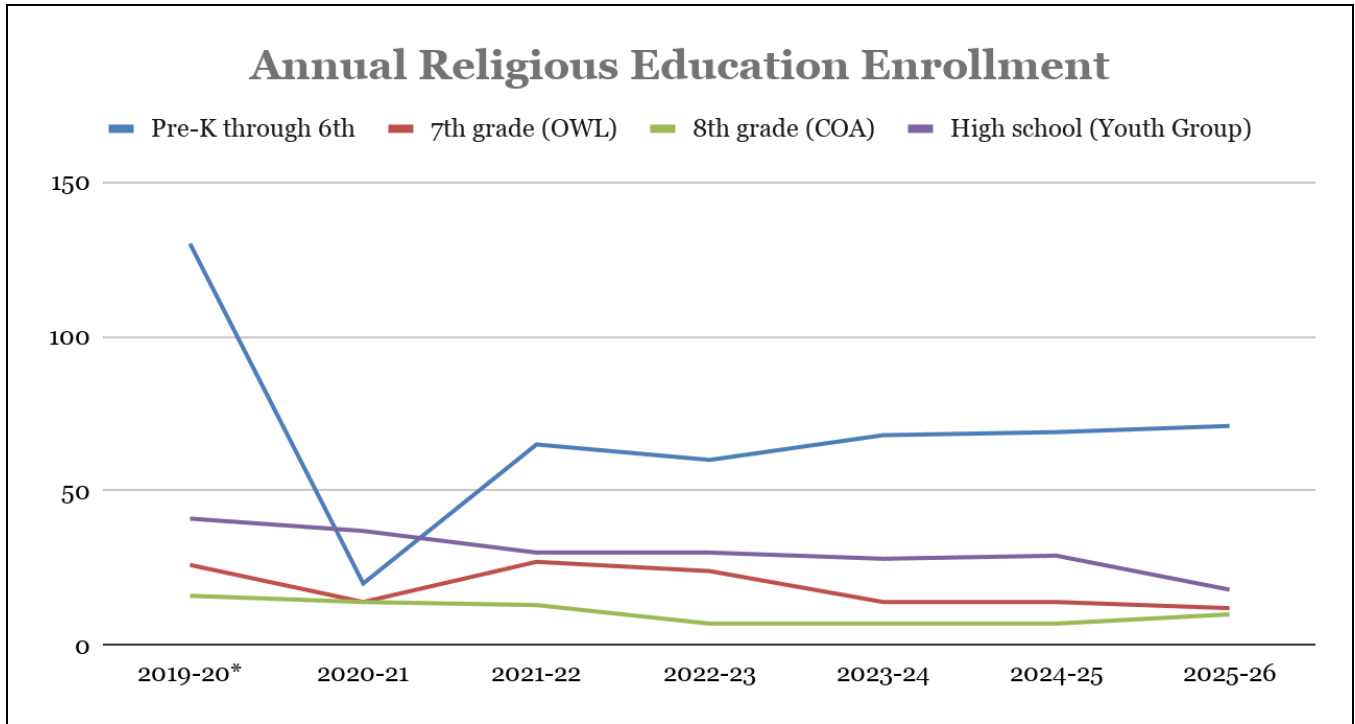
	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
average Sunday attendance	238	219	187	172	210	224	247	223
average Sunday attendance as a % of total membership	54.3%	50.2%	41.9%	38.0%	47.6%	49.2%	55.8%	53.6%

Average Monthly Sunday Attendance 2025 - 2026

Total attendance numbers are the sum of in-person attendance plus online attendance.
 Online attendance is the number of screens staying 30 minutes or longer.

	Sanctuary	Online	Total	% Online
Sept. 2025	209	51	260	19%
October	152	51	203	25%
November	166	54	219	24%
December	161	50	210	24%
January 2026	150	67	217	31%
February	152	55	207	26%
March	174	43	218	20%
April (first half)	235	46	281	16%
Average over the last eight months:	171	52	223	23%
The same 8 months last year (2024-25)	187	60	247	24%

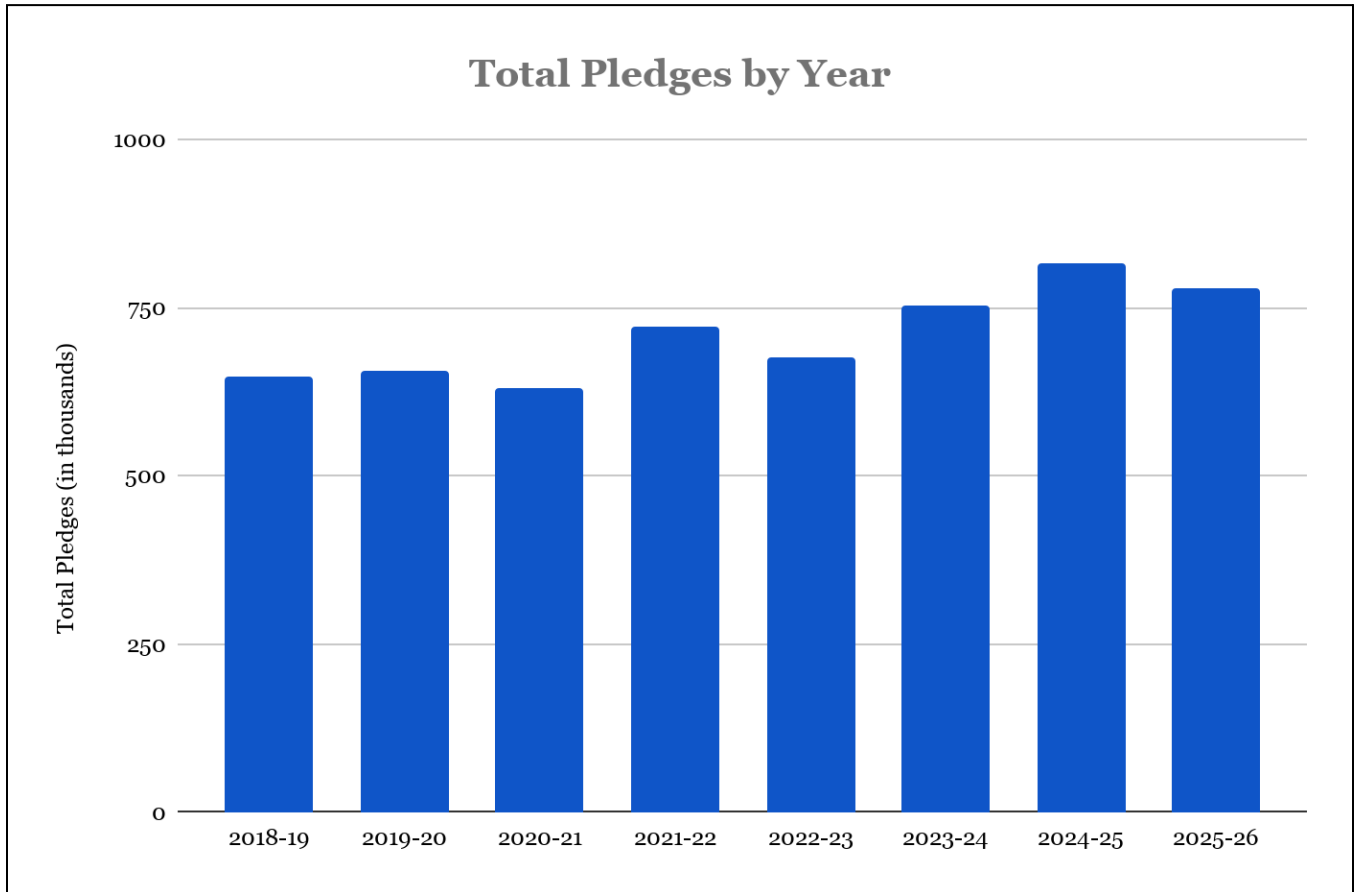
Religious Education



	2019-20*	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
number of children Pre-K through 6th grade registered for Sunday morning RE	130	20	65	60	68	69	71
number of 7th graders in OWL class (Winter/Spring)	26	14	27	24	14	14	12
number of 8th graders in Coming of Age class (Spring)	16	14	13	7	7	7	10
number of high school students in the Youth Group	41	37	30	30	28	29	18

First Parish Notables

- Staff continue to be paid at compensation levels recommended by the UUA.
- First Parish continues to contribute as an Honor Congregation in support of the UUA.



	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
Pledges	\$647,000	\$656,415	\$631,732	\$722,814	\$675,939	\$752,793	\$815,153	\$779,077
% Change from Prior Year	9.0%	1.5%	-3.8%	14.4%	-6.5%	11.4%	8.3%	-4.4%
Average Pledge	\$2,254	\$2,267	\$2,977	\$2,707	\$2,901	\$2,929	\$2,964	\$3,067
# Households pledging	287	290	260	267	233	257	275	255

Program Reports

Report: Minister of Religious Education, Rev. Stevie Carmody

Contact: MRE@firstparish.info

Report on the Religious Education Program for Children & Youth, 2025-2026

Change and transformation—a theme for First Parish more widely this year—was alive within our Religious Education Program for Children & Youth. In this interim ministry period, the volunteers, staff, and participants had the opportunity to explore different questions concerning who we are and where we’re going. May and June 2025 saw a successful hiring process within the youth community for a new Youth Program Coordinator. The periods of my parental leave (January 15th-March 6th, April 15th-May 13th) offered opportunities for more understanding of the processes and supports that help maintain a successful week-to-week program. And the interim process itself drew attention throughout the year to the role of intergenerational community building, parent and family supports, and inclusion of young people.

First Parish’s Sunday morning program serves, on average, **33 children (nursery - grade 7)** on non-holiday weekends, and we have about 83 children registered in the program. We continue to have grade-based classes, co-taught by volunteers within our community (you can read their names below). Some program highlights:

- The **Grade 6/7 Neighboring Faiths program** visited an exciting array of communities around the Boston area, including: Kahal B’raira (Humanist Judaism), Jain Sangh of New England, the Kurukulla Center (Buddhist), Cambridge Friends (Quaker), Calvary Methodist of Arlington, the Paulist Center (Catholic), & First Parish Malden (Unitarian Universalist). Additionally, the group explored Pagan traditions, and participated in a “make your own religion” workshop.
- The **Grade 6/7 class** also helped pilot the Indigenous Justice Working Group’s new curriculum, entitled: “An ‘Is,’ Not a ‘Was’: Native Americans in the 21st Century”. Run throughout the Fall on holiday weekend, the pilot explored themes of stereotypes, mascots, memorials, and Thanksgiving. A big thank you to Jen Davis-Kay and Annie Homza who crafted the curriculum over many years.
- The **Grade 4/5 class** explored the New Testament and the story of Jesus through the curriculum “Kingdom of Equals”. In Unitarian Universalist fashion, the curriculum aims to look respectfully and curiously at the teachings of Jesus, taking into account both the impact that Jesus (and Christianity) has had on our modern understandings of justice, love, and care, and the Biblical context surrounding the well-known stories, parables,

and events. At the end of the year, the group engaged in a play-based curriculum (for the second year in a row), all about our Unitarian Universalist values.

- The **Grade 2/3 class** spent the entirety of the year exploring our connection to nature, living things, the environment, and animals, through the “Connections with the Web of Life” curriculum. In the Winter and Spring, the curriculum uses *Charlotte’s Web* to also explore themes of life cycles, birth, death, friendship, and care.
- The **Grade K/1 class** and **Pre-K class** both used curricula that helped our youngest learn what it means to be part of First Parish as a community, and build values of compassion, caring, and kindness.

Alongside the regular term class, the morning programs were also enhanced by **“All-Together” Sunday morning programs**, combining all the grades together on holiday weekends for thematic programming.

- October explored the Water Protector movements and stewardship of our waterways.
- November explored indigenous food sources and Reciprocity through Three Sisters planting.
- December brought a Service project over two weeks, making care packages for individuals within our community who needed a little extra love at the holidays.
- January explored Rev. Dr. Martin Luther King Jr’s concept of “Somebodyness” and working for a world where everyone’s inherent value is honored
- February explored themes of grief and justice.
- April explored beauty and stewardship for the Earth, tending our gardens around First Parish.

Furthermore, some Sunday morning worship services were offered as **Multigenerational Sunday Worship**, where kids stayed in the service the whole time. In December for our Christmas Service, the “Christmas Carol” pageant explored themes of generosity and service to others. In April for our Easter Service, the themes of Legacy, Rootedness, and Community were threaded together through the song “Trees We’ll Never See”. These collaborations were greatly aided by collaboration with our music staff and the ministers **Rev. Jonipher**, **Rev. Erica**, and **Rev. Carolyn** (adjunct).

As mentioned above, one transforming aspect of the year was the arrival of my daughter Hazel Louise Carmody in January 2026. Preparations began in the Fall for my parental leave, planning with our RE Staff Bella and K, and the Religious Education Committee. **Rev. Emily Conger** was hired as adjunct Director of Religious Education for the parental leave period, bringing a steady pastoral presence and creative direction. **Religious Education Assistant Bella Jaffe** especially guided the leave process, working closely with our volunteers and Rev. Emily to ensure continuity during this time.

Saying farewell to Rose, our previous Youth Program Coordinator, in June was bittersweet. Concurrently, an excellent hiring team (Kat Cass, Andrew Kobayashi, Rev. Stevie, Lauren McNeill, Conard Anderson, & Lettie Carswell) ran a full search for a new Youth Program Coordinator, and in the process, helped envision the community’s goals for future years.

Onboarding **K Milano—our new Youth Program Coordinator**—throughout the summer and in the fall was a well-spent effort; they have enthusiastically engaged in the new role, always keeping youth empowerment at the forefront.

First Parish's Sunday Evening programs—Youth Group (high school), Our Whole Lives (OWL) comprehensive sexuality education for Grade 7-8, and Coming of Age (grade 8)—continue to engage our teens in dynamic programming around UU values. See K's report for a full overview of the Youth Program. In OWL, we continue to work with Kahal B'raira, a local Jewish congregation, and our program welcomes teens outside our direct community. The community building we've invested in to build those cohorts is paying off over the years. In COA, a strongly bonded cohort is currently preparing for their program's conclusion at the end of May, bringing their energy and enthusiasm, gracefully channeled by our COA mentors.

Overall, including morning and evening programming, we serve, **on average, 56 children and youth** on a typical Sunday, with a total registered number of 111 children and youth.

Supporting all this work is the elected, volunteer **Religious Education Committee**, which meets monthly, oversees the program alongside me, and offers valuable guidance and leadership in many parts of our program. They have especially focused on intergenerational/family engagement (hosting several events for people of all ages at First Parish throughout the year), and volunteer support (the behind the scenes processes for recruiting, training, support, and feedback).

A thank you to the many volunteers that make this program possible:

The **Religious Education Committee**, including Betsy Carlton-Gysan (chair), Sharon Jacobson, Janis Fleishman (treasurer), Kat Cass, Eric Breck, Cathy Slesnick, & Lauren Newton.

The Many **Our Whole Lives (O.W.L.) Facilitators**, including Lidia Prunte, Rowan Wheeler, & Sara Galantowicz (middle school O.W.L. 2025) and Lidia Prunte, Bella Jaffe, & Leslie Lewis (middle school O.W.L. 2026); and our back-up facilitators Wendy Fields, Melanie Cohn-Hopwood, Stevie Carmody, and David Whitford.

Youth Group Adult Advisors Bill Licea-Kane, Andrew Kobayashi, Paul Franzosa, & Barbara Dumery.

The **Coming of Age Mentors** Carolyn Hodges, Pamela Baldwin, Phil Speare, & Peter Heller, and the C.O.A. **Writing Coaches**.

The Sunday morning teachers—Nursery: Lauren McNeill, Lia McDonald Meterer; Pre-K: Amy Hadley, Carol Lewis, Katie Limb (high school helper), Tali Avery, Melissa Naylor, Francis O'Donovan, & Cal Robie; K/1: Jen Baxter, Joanne Cullinane, Ellen Kloss, Kate Guilbault, Fae Kramer, Madeleine Duke, & Lauren Cosgrove; 2/3: Gale Page, Francis O'Donovan, Mike Rie,

Marc Jacobson, Cale Pennington, & James Brooks; 4/5: James Brooks, Logan Castrucci, Sarah Quick, Alan Linov, David Desjardins, Genevieve Baldwin, & Megan Shand; 6/7: Tina Silberman, Jerry Silberman, Erica LeBow, Tara Rosenberger Shankar, Genevieve Baldwin, David Whitford, & Ellen Robie.

High school teens Nate Robie and Katie Limb assisted in supporting the program on Sunday mornings and in organizational capacities.

And the many other volunteers helping with **“All Together” Sundays, Time for All Ages, Classroom Supports, and Substitute Teaching.**

Warmly,



Rev. Stevie Carmody
Minister of Religious Education

Report: Youth Program Coordinator, K Milano

Contact: ypc@firstparish.info

In the 2025-2026 Youth Program year, we have 18 registered high school youth and 4 advisors who join together on Sunday evenings from 7:00pm-8:30pm. Attendance on most Sundays averages 8-13 youth.

New Members

This year we welcomed 4 new members from the freshman class at the start of the year. All four members stayed with us throughout the year.

Adult Advisors

Thank you to Paul Franzosa, Andrew Kobayashi, Bill Licea-Kane who continue to be present for the youth. Thank you to Barbara Dumery who joined us this year as a new youth advisor! Through games, art, food, and music - thank you for sharing your talents with us!

YAC (Youth Advisory Committee)

This year's YAC consisted of the following youth:

Co-Leaders: Conard Anderson & Lettie Carswell

Worship Coordinator: Lauren McNeill

Social Action Coordinator: Lydia Rauh

Chaplain: Onyx Hopwood

Fundraising Coordinator: Sean Maher

Music Coordinator: Calvin Qazilbash

Food Coordinator: Brendan Maher

Art Coordinator: *This YAC role has been phased out

Freshman Representatives: Arthur O'Donovan & Kyle Martyn-Crawford

Adult Advisors: Stevie Carmody, Paul Franzosa, & K. Milano

Our YAC met monthly to review the needs of the Youth Group and to begin to plan events, such as the Worship Service.

Worship Service

The Youth Worship Service took place on March 22, 2026, on the theme of Nature — chosen by the youth themselves. The group held reflections on their relationship to the natural world and broke into teams to plan elements of the service. On the day, the youth created art for the sanctuary, performed music, led a litany of youth voices, and seniors reflected on their time at First Parish. It was a service that showed just how much this group has grown.

Highlights of Youth Group Sunday Nights

We always have fun together on Sunday evenings, but here are some highlights from the year!:

- Under the leadership of Coleaders Lettie and Conard, we have pioneered a system where YAC leaders rotate through leading Sunday night Youth Group. Here are (just some) highlights from each YAC position:
 - Worship Coordinator Lauren McNeill led a graveyard reflection on death and spirituality
 - Social Action Coordinator Lydia Rauh led the group in making over 100 care packages for Pine Street Inn
 - Chaplain Onyx Hopwood led a rejuvenating spa night
 - Fundraising Coordinator Sean Maher led the group in making candle votives to sell at the Harvest Moon Festival
 - Music Coordinator Calvin Qazilbash led the group in singing together around a makeshift fireplace
 - Food Coordinator Brendan Maher led the group in making egg rolls from scratch — and the best yogurt parfaits I have ever had
 - Freshman Representatives Arthur O'Donovan and Kyle Martyn-Crawford led a festive Holiday Party complete with a trivia game of Kyle's own design

Special Events

- We took the Youth Group on the **Ferry Beach Retreat** to foster connections with the broader First Parish community.
- Youth made objects to sell and volunteered at the **Harvest Moon Festival**.
- We hosted a **December Bake Sale** to raise money for Boston Healthcare for the Homeless and next year's service trip.
- We cohosted a **Multigenerational Dance Party** with the RE Committee, with youth preparing a spaghetti dinner for the occasion.
- Four youth attended the **Pi Day Youth Con** in Nashua, NH, connecting with forty other youth from across the region through circle worship and workshops.
- We joined **Adventures for Justice** with UU Mass Action and three other area youth groups, learning community organizing skills and exploring Boda Borg together.

- We **toured Boston Healthcare for the Homeless Program** to deepen our connection to the organization we have been supporting through fundraising all year.
- We hosted a Senior **Dinner**, welcoming graduating seniors from across First Parish to reflect on their journeys ahead of the Senior Blessing on May 17th.

Looking Ahead

As the year draws to a close, we have several meaningful events still to come: a **Senior Blessing** during worship on May 17th, a **STAR Potluck** on May 29th, our second **Lock-In** on May 30th, and a **Music and Art Benefit** on June 18th featuring local bands and donated art, with proceeds going to Boston Healthcare for the Homeless and next year's service trip.

Plans for Next Year

My first year in this role has been a special one. We will welcome a large Coming of Age cohort next year, and I look forward to deepening our connection to the congregation, social justice, and worship — including a Service Trip that I know will cement the bonds of this group even further.

This is an incredible group of young people, and I am so grateful to work alongside them. I can't wait for all that awaits us in 2026-2027.

Report: Music Director, Daniel Parsley

Contact: musicdirector@firstparish.info

Program Overview

The 2025–2026 program year represented a period of continued growth, creativity, and deepened engagement for the music ministry at First Parish of Arlington. Over the course of the year, our ensembles and collaborators expanded both their artistic range and their connection to the wider community. The result has been a vibrant and welcoming musical environment that supports participation at many levels and reflects the spirit of the congregation.

We began the year by honoring the remarkable tenure of Marta Flanagan, who served as Lead Minister for nearly seventeen years, and by welcoming Interim Lead Minister Rev. Dr. Jonipher Kwong into the life of the parish. Throughout the year, Jennifer Kobayashi sustained the strong presence of our Bell Choir, while a variety of small ensembles and individual musicians contributed meaningfully to worship across a wide spectrum of styles.

Our accompanist, Ken Seitz, played an essential artistic role, not only through his sensitive and skillful playing, but also through the introduction of his own original choral works, which were featured in both a fall service and during Easter. The Music Committee remained an active and

forward-looking partner in the program, supporting both day-to-day operations and broader initiatives. Among these, the continued development of the Choral Scholar Program—launched the previous season—has proven to be especially impactful.

Seasonal programming offered several memorable highlights. In December, Music Sunday centered on Benjamin Britten’s *Ceremony of Carols*, presented with harp and interwoven reflections from members of the congregation exploring themes of memory and the cultural resonance of carols. That same month, we welcomed a children’s chorus into worship, further expanding intergenerational participation. Christmas Eve featured guest organist Mark Nelson alongside trumpeter Brendan Mathieson, adding a festive and celebratory dimension to the service.

Community engagement remained a central focus throughout the year. A parish-wide talent show in February 2026 drew enthusiastic participation, and guest artists from both within First Parish and the broader Boston area—including Crabapple Jam, the Unitubular Saxoversalists, Paul Franzosa, David Stern and Diane Taraz—brought additional variety and energy to our offerings. In April, we were honored to host composer and activist B.E. Boykin, who shared her music in worship and collaborated directly with the choir. The year concludes with a May Music Sunday featuring Vivaldi’s *Gloria* with orchestra, reflecting on themes of joy, humility, and collective expression.

Selected Highlights

- Resumption of regular rehearsals for Choir, Bell Choir, and small ensembles in Fall 2025
- December Music Sunday featuring Britten’s *Ceremony of Carols*, with harp and congregational reflections on memory and tradition
- May Music Sunday presenting Vivaldi’s *Gloria* with orchestra, paired with thematic reflections on humble “Glory”
- Participation of a children’s chorus in winter worship services
- Youth-led RE Sunday featuring musical leadership from younger members of the congregation
- Easter service enriched by guest organist Mark Nelson
- Ongoing growth and institutional support of the Choral Scholar Program
- Strong and consistent choir participation, averaging approximately 25 singers weekly—an increase from last year, with particularly robust involvement in major services
- Opening-of-season choir social and potluck fostering community among singers
- Successful parish talent show (January 2026) showcasing a wide range of community talent
- Created an online inventory of choral music in our possession and updated the Google doc with month of performance starting this church year.

Closing Reflection

The strength of the music program at First Parish lies in the dedication, generosity, and creativity of its people. It has been a privilege to work alongside such committed musicians, volunteers, and leaders. I am especially grateful to Music Committee Co-Chairs Robin Baker and Bob Rowlands for their continued guidance and support, as well as to all who contributed their time and talents throughout the year.

Respectfully submitted,

Daniel Parsley

Director of Music

First Parish in Arlington

May 2026

Robin Baker & Bob Rowlands

Music Committee Co-Chairs

Standing Committees' Reports

Finance Committee

Contact: finance@firstparish.info

Purpose/Mission: The Finance Committee prepares the Parish budget for the Parish Committee and helps the Parish Committee evaluate and finalize the budget.

Major activities (bulleted list):

- collected budget input from Committees and staff
- reviewed input with Ministerial staff and the Executive Committee of Parish Committee
- prepared draft budget for Stewardship committee
- modified budget based on Stewardship campaign and other changes and worked with Exec and Parish committees to draft a final budget for annual meeting vote.

Challenges or improvement opportunities: small committee; facilitating accurate, timely data collection from a variety of sources across First Parish

2025-26 Priorities:

- Prepare for Treasurer transition and recruit committee members
- document procedures to support onboarding new members and maintain consistent processes

- build a process with staff, Treasurer, and HR committee to maintain coordinated and current personnel budget data

Chair: Lissa Mcburney

Committee members: Lissa McBurney (ends 2027) Stephen Pillemer (ends 2028)

EX OFFICIO MEMBER: Carolyn Hodges, Treasurer (second 3-year term ends 2027)

Human Resource Committee

Contact: humanresources@firstparish.info

Mission: The mission of the Human Resources Committee (HRC) is to create and promote appropriate human resources policies and practices that support healthy relationships between and among staff, volunteers and congregants, and maintain best practices as recommended by the UUA. It works proactively to promote healthy practices, provides advice and support during the hiring and departures of staff, and provides assistance to supervisors in challenging situations. Throughout its activities, the HRC is committed to fostering diversity and inclusion in the First Parish of Arlington hiring practices.

As a committee, we are committed to warm welcome, compliance, transparency, and promoting the best possible working conditions for FP’s fabulous staff.

Major Activities During the 2025-26 Program Year

- Held welcoming and follow-up meetings with Rev. Jonipher to provide consultation to the head of staff and to get feedback on HR priorities.
- Participated in office staff payroll training provided by external vendor Your Part-Time Controller.
- Reviewed staff mapping to UUA guidance for salary bands
- Cross-walked the FPUU Employee handbook with the UUA template and made additional updates to align with changes (e.g., Roth donations to the retirement plan and the upcoming biweekly payroll schedule)
- Conducted “check-in” meetings with most staff members and ministers at First Parish to hear about their work experiences and answer any questions they have.
- Summarized employee feedback themes and shared with the ministers, the Transition Team, and the Parish Committee.
- Conducted an exit interview with Rose Sawyer Marsh, former Youth Group Coordinator.
- Responded to inquiries from staff regarding leave and benefits.
- Assisted in reviewing job descriptions and the hiring process for new staff.

- Customized on-line ethics, compliance, and conduct training to align with the revised Employee Handbook, for implementation next program year.
- Identified basic cybersecurity training for staff to complete by the end of the program year.

Challenges and Priorities

We want to build on our conversations with staff this year and continue with check-ins and explore other ways to solicit staff feedback, so that we can build and maintain a healthy work environment. We have specific recommendations gleaned through past exit interviews and our check-in meetings with current staff for future implementation.

There is a lack of clarity on which committees or individuals are responsible for and have the authority to enforce compliance with the Employee Handbook.

We were not successful in expanding committee membership, which resulted in a heavier workload for the two committee members.

Chair: Sara Galantowicz

Committee members: Sara Galantowicz and Sara Whitford. (First term ending 2027)

Leadership Development Committee

Contact: leadership@firstparish.info

Purpose/Mission: To encourage and facilitate participation in First Parish committees, support our lay leaders by promoting leadership development throughout our congregation, and nominate individuals to fill vacancies on standing committees and as parish officers prior to the Annual Meeting.

Chair: Kiki Giatis (2nd term ends 2027)

Chair: Kiki Giatis (2nd term ends 2027)

Major activities (bulleted list):

- Leadership Development Roundtable (November 2025 - Rev. Jonipher and Introduction to Engage).
- Leadership Development Roundtable (January 2026 Introduction to RACI)
- Coordinated Leading with Love worship March 26 with Shared Ministry.
- Participate in the Parish Committee initiative Engage.
- Track standing committee members and terms for FY27 to help prepare the ballot for the Annual Meeting.
- Informal event for outgoing committee members (TBD)

Challenges or improvement opportunities:

Room availability was very difficult to schedule events, particularly in winter/spring 2026.

More limited volunteer pool due to creation of Transition Team and those interested in Search Committee.

2026-2027 Priorities (bulleted list):

- Continue Leadership Roundtables
- Hold Honored Rookie Event in the fall
- Recruit members to LDC.

Membership Committee

Contact: membership@firstparish.info

Purpose/Mission: Using the philosophy of a “ministry of the welcome table” and the skills of radical welcome, we greet and warmly welcome visitors to First Parish and help them learn about our community. We guide congregants on the path to membership, supporting and encouraging them as they find ways to engage and connect with their new congregation.

Chair: Amy Anderson (second term ends 2028)

Committee members:

Christian Collins (second term ends 2028)
Lois Fine (first term ends 2027)
Mary Fusoni (first term ends 2028)
Mary McCartney (third term ends 2027)
Sarah Quick (first term ends 2028)
Jerry Silberman (first term ends 2027)
Cindy Stinson (first term ends 2028)

Rev. Erica Richmond has provided valuable ministerial support for our work.

Major Activities

Membership Committee Development:

- Rev. Jonipher joined our September mini-retreat to meet us and speak to us about the challenges and opportunities membership committees typically face during interim periods.
- Over the course of three meetings, we crafted a Membership Committee Covenant to articulate how we aspire to work together for the benefit of the congregation.
- We reviewed the mechanics/logistics of the welcome table, and set priorities for the year.
- Having met via Zoom last year, we recommitted to meeting in person.

Community Communications:

- We hosted a Community Summer Potluck in September.
- Town Day

- o We staffed a Membership table to greet visitors and share information about First Parish.
- Harvest Moon Fair
 - o We staffed a Membership table to greet visitors to the Fair and share information about First Parish.
- Engage Initiative
 - o Two members of the Membership Committee served as liaisons to the Engage subcommittee, working to spread the word about the Engage initiative at the Welcome Table.

Welcome Table:

- One or two Membership Committee members staffed the Welcome Table each Sunday before and after worship.
- Name Tags
 - o We enlisted the help of member Jon Kloss to reimagine how nametags might be organized in the narthex; the system of “borrowing” a lanyard is a great fix!
 - o In addition to supplying disposable name tags for newcomers, we manage requests for new permanent name tags that are then created by Allison Sillers.
- Connection Cards
 - o We continued to offer visitors the opportunity to complete a Connection Card; we followed up with a personalized welcome email.
 - o We continued to provide a similar, personal welcome to those who fill out a Connection Card online at the First Parish website.
 - o We continue to maintain a tracking document to ensure follow up with connection card completers and to understand the needs/desires of visitors.

Programming and Events:

Pathway to Membership Reimagined

- When the fall New UU class had to be canceled due to lack of registrations, the committee looked to the approaches of other congregations (as reported in *UU World*) and reimagined the pathway to membership, a replacement to the New UU model, which has taken place over two consecutive Saturdays.
- Together we drafted, revised, edited, and published a new Membership Booklet to help newcomers get to know our congregation and understand the new pathway to membership.
- Two minister-led segments of the old New UU course were turned into Pathway to Membership workshops: 1) UU History and Theology and 2) What Do We Mean by Covenant?
 - o We scheduled two opportunities for new congregants to take each course. Rev. Erica led two sessions of UU History and Theology; Rev. Jonipher led the first What Do We Mean By Covenant? workshop, and Rev. Stevie will lead the second later this program year.
- Congregants interested in membership are encouraged to participate in 3-5 other congregational programs—any programs—in addition to the two minister-led workshops before signing the membership book.

Who Are UU?:

- We have offered a once a month “quiet coffee hour” series (January- June) to help new and “new-ish” members of First Parish feel more connected to the First Parish community, which can be hard in a congregation as large and bustling as ours.

- The program has featured drop-in sessions scheduled after worship as an alternative to coffee hour in the vestry. The sessions offered structured activities designed to help people share more deeply than coffee hour conversations sometimes allow.

***Love at the Center* Book Discussion:**

- We have led a once a month book discussion series (January-June) focusing each month on two chapters of *Love at the Center: Unitarian Universalist Theologies*, Sofia Betancort, editor.
- Having given this text to new members in spring 2025, we issued a special invitation to them to join the book series but opened it to all and purchased copies of the text to loan.
- 23 people are currently registered; registration remains open to all.
- Coffee with the minister
 - In mid October, we offered congregants a chance to sit with Rev. Erica for coffee or tea, snacks, and casual conversation. Those who participated appreciated the chance to pose questions and engage with each other and Rev. Erica.
- New Member Ceremony
 - We recognized and welcomed 12 new members during a worship service and at a reception afterward.
 - We offered tokens of welcome—chalice pins and a copy of *Love at the Center*—as well as a copy of Reverend Charles Grady’s *Arlington’s First Parish: A History*, provided by the Women’s Alliance.

Challenges or improvement opportunities:

- We have an opportunity to more clearly communicate the new Pathway to Membership structure.
- Additionally, we will want to evaluate the new Pathway to Membership approach, but should first establish what we believe success looks like.
- The interim period brings challenges and opportunities to the entire congregation; there is much about the process we are going through that is confusing to those who are not familiar with UU congregations.

2026-2027 Priorities:

- As we continue in this period of ministerial change and congregational discernment, we will continue to warmly welcome newcomers and joyously advertise all that is vibrant, steadfast, and good about our congregation. The interim period may feel unsettling to newcomers; we seek to be consistent in warmly welcoming all who walk into First Parish, even as we companion each other as we navigate change and the discomfort, uncertainty, and grief that may accompany change.
- We hope to draw in more volunteers to be Friends of the Welcome table and train them to help offer a radical and inclusive welcome.
- We will continue to be a resource to all our new members and to help them become more involved (or stay involved) in the life of First Parish.

Property Committee

Contact: property@firstparish.info

Purpose/Mission:

The Property Committee is tasked to maintain and enhance the First Parish buildings and grounds, making First Parish an **inviting** and **safe** environment with minimal footprint on the planet. The Committee is responsible for planning, coordinating, problem-solving, budgeting and implementing projects associated with campus property needs. Committee members also do many maintenance tasks themselves, ranging from routine lightbulb changing to complex and unique repairs.

Chair: Mark Wilke

Vice Chair: <open>

Committee members:

Mark Wilke (1st term ends June 2028)
David Dreyfus (2nd term ends June 2027)
Mara Prentis (1st term ends June 2027)
Steve Pillemer (1st term ends June 2028)
Helen Rasmussen (1st term ends June 2028)
Tim Keefe (1st term ends June 2029)
John Galantowicz (term ends 2028)
Greg Ruccio (emeritus)

Major activities:

- Members logged over 100 volunteer hours actual work on the property (not meetings)
- Repainted new minister's office
- Heating system (boiler) failure issues
- Managed building temperature during extreme cold spells
- Planed for boiler replacement
- Snow clearing and ice melt after many small storms and two blizzards
- Hired project management company for cleaning and possible other services
- Efforts to keep front maple healthy, feeding, trimming
- Continued updating Property knowledge in Google Docs
- 3 main entry doors and sills repaired and upgraded
- Tobey Lounge large fogged window replacement
- Replaced/ repaired toilets in the main restrooms
- Elevator flooring replacement
- Got and installed 6 more restricted parking signs
- Replaced numerous emergency lighting fixtures
- Mowed grass and trimmed trees and shrubs
- Engaged wider group for fall and spring First Parish Clean-It/Fix-It events
- Fixed this and that: chair repairs, wayside pulpit, bell wiring, riser lights, door closers, vestry floor, trash disposal, drains cleared, etc.
 - Generally repaired and maintained plumbing, heating, A/C, ventilation, lighting,

doors, alarm systems, windows, and grounds

Challenges or improvement opportunities:

- Funding for infrastructure upgrade projects (e.g. boiler, weatherization, etc.)
- Members are challenged by many small and large repair needs, hard winter weather

2025-2026 Priorities:

- Replace failing boiler and boiler upgrade funding
- Investigate Spire bell repair
- Investigate more areas covered by electrification (heat pumps)
- Assist planning and input for any front lawn changes

Religious Education Committee

Contact: re@firstparish.info

Vision: A religious education program that nurtures children and youth to become adults who are faithful to themselves, their communities, their values, and their spiritual journeys.

Mission: To nourish and support First Parish’s children on their journeys to adulthood through community engagement, living of Unitarian Universalist values, participatory education, spiritual and personal growth, and religious literacy.

Chair: Betsy Carlton-Gysan (first term ends 2026)

Committee members:

- Janis Fleishman (treasurer) (first term ends 2026)
- Sharon Jacobson (first term ends 2026)
- Kat Cass (first term ends 2027)
- Cathy Slesnick (first term ends 2028)
- Eric Breck (first term ends 2028)
- Lauren Newton (first term ends 2028)

Major activities:

- The committee met monthly to oversee the Religious Education program for children and youth, joined by the Religious Education staff (Rev. Stevie, Bella, and K).
- Two subcommittees worked throughout the year around two goals:
 - Increase opportunities for parents, children, and families to connect with the wider First Parish community, including a community dance, a holiday pageant, a family game night, a potluck, and a Kidz Annual Meeting.
 - Streamline and refine our volunteer systems of recruitment, training, and support, including efforts to define “success” for volunteers, to create

administrative processes for volunteer tracking, and to regularly assess volunteer experiences in religious education.

- The committee worked closely with staff to prepare for and navigate Rev. Stevie's parental leave (January 15–March 5th, April 15–May 13), through delegation, increased volunteer and staff efforts, and the support of adjunct DRE Rev. Emily Conger
- The committee met with members of the Transition team, and the chair met with the Interim Lead Minister to advocate for the religious education program and the needs of children and families in this interim period.

Challenges or improvement opportunities:

- Age and relevancy of curriculum we use requires a lot of staff and volunteer time to update and adapt for our current young people
- Sharing space with our tenant in RE wing
- Technology (software, administrative systems) as a barrier to tracking volunteers and constituents

Successes

- Welcomed our new YPC, K Milano, navigating the transition of Rose's departure and the hiring process.
- Steady enrollment and involvement of children and families
- Improved volunteer recruitment and onboarding in a timely and thorough fashion
- Sponsored several intergenerational and family-focused events throughout the program year

2026–2027 Priorities:

- Welcome new RE Committee members and onboard a new Chair
- Continue improvement around volunteer recruitment, training, and support.
- Support parents and families involvement in wider First Parish community, especially around the future of First Parish
- Engage with the congregational processes around Ministerial Search, Covenanting and Safer Congregations, helping advocate for children and families

Social Justice Committee

Contact: socialjustice@firstparish.info

Purpose of Committee:

The Social Justice Committee (SJC) is the primary hub for pursuing the mission of the overall social justice program to “provide leadership, support, and coordination to the social justice endeavors of First Parish.”

SJC takes the lead in coordinating and resourcing topic-focused working groups, which currently are the Racial Justice Coordinating Committee, Indigenous Justice Working Group, the Climate Action Working Group, the Defending Democracy Working Group, UU Urban Ministry Working Group and the Working Group on Peace & Justice in Israel-Palestine. We vet proposals for establishment of new working groups, respond to requests for funding and event co-sponsorships, and occasionally organize events that are outside the scope of any working group. In addition, we are responsible for the annual Pie Palace fundraiser, the annual Living Our Faith and Shinn worship services, the Giving First (plate collection sharing) program, and responses to emergent issues related to social justice.

Committee Membership: Maggie Carey, Joanne Pohl, Anne Ehlert, Tish Miller, and Melissa Berczuk (chair).

Task Groups: A portion of SJC responsibilities are handled by task groups for the Pie Palace, Giving First, worship, and emergent issues. Each task group includes one or more SJC members.

Social Justice Program Council: The purpose of this council is to improve coordination of the social justice program and to include working group leaders in discussion of issues affecting the direction of the program as a whole. The council includes SJC members, representatives of the working groups, representatives of the LGBTQIA + Affirming Committee, representatives of ArCS Cluster (an immigration justice-related group outside SJC), and Rev. Erica Richmond.

Congregational partnership with UU Mass Action: SJC is in the fourth year of a congregational partnership with UU Mass Action. Our partnership enables us to enrich our social justice program, to broaden its reach, and to nurture relationships with other UUs and with organizations allied with UUMA. The partnership entails commitments between the organizations, to be reviewed and renewed annually.

Activities of the Social Justice Committee, Working Groups and Task Groups:

1. Pie Palace - With the leadership of the Pie Palace Task Group, we conducted the traditional Arlington Town Day pie sale to raise funds to support First Parish social justice work. With the help of many volunteers, the event netted \$2,686 after expenses.
2. Living Our Faith Service - On October 26 we heard about the social justice activism of three members: Betsy Carlson-Gysan, Peter Heller and Betsy Leondar-Wright. The service was organized by the SJ Worship Task Group.
3. Shinn Service - The SJ Worship Task Group has organized to host Jordan Clark, enrolled member, Wampanoag Tribe of Aquinnah, Executive Director, Harvard University Native American Program, on May 10. He will present a sermon and stay for a reverberations discussion session after the service.
4. Giving First -The Giving First Task Group solicited and received nominations for many worthy organizations, and selected the slate that will share 50% of each month's offering at Sunday services in 2026. Over \$23,000 was collected during calendar 2025, and \$260,000 has been distributed to date since July of 2013.
5. Public witness banners were displayed on the front lawn of the meetinghouse, presenting a series of short messages, most of which were on social justice issues. The selection of messages and the composition and procurement of banners was managed by the Emergent Issues Task Group.
6. We staffed a table at coffee hour to share information about the social justice program and related events. We also spread the word about justice actions with the Two for Tuesday newsletter, produced by Joanne Pohl.
7. The Defending Democracy Working Group (DDWG) sought to engage with interfaith and community groups throughout the year including hosting the Prayers for Liberty March in September, a vigil in January dedicated to the loss of life from ICE-related violence, and two No Kings rallies in October and March. The group partnered with Indivisible Arlington on the March event which had well over 1,000 participants. DDWG also hosted poster-making events before each No Kings rally, inviting Indivisible to the March gathering. They led card writing to support UU churches in Minneapolis following the ICE-related violence there, and two book discussion groups, both in conjunction with STAR. Immigration was another focus of DDWG and encouraged FP UU to bear witness at the ICE facility in Burlington throughout the year. As well, the group hosted a workshop with Massachusetts Immigrant & Refugee Advocacy Coalition (MIRA) on knowing our rights and responsibilities should ICE agents enter First Parish, and facilitated First Parish acquiring signage to mark private areas on our property.
8. The Racial Justice Coordinating Committee and its Reckoning & Repair working Group (R&R) selected the Roxbury Youth Programs (RYP) as the Black-led organization to receive financial support from the newly established FP Reparations Fund, as well as volunteer support as requested. After a successful fund-raising drive last November, First Parish donated \$27,000 for FY25-26 to RYP and expect annual donations in years 2 and 3 to be within the range of \$7,000 - \$10,000. R&R will

- continue to offer support to RYP and attend RYP and UUUM events this spring and summer. Plans for a fall fund-raiser for RYP are underway while R&R continues its efforts to educate First Parish congregants on the importance of reparations.
9. The Indigenous Justice Working Group (IJWG) was involved as Jen Davis Kay and Wampanoag educator Anne Homza developed 4 RE lessons for 4th and 6th graders. IJWG collaborated with the Dallin Museum on an Indigenous Peoples' Day event (BOMBAntillana), as well as a special guest speaker, Diné Elder Lupita McClanahan who discussed Hozho, the Beauty Way, the practice of resilience and overcoming unimaginable challenges. The group also held a meeting with the UU Mass Action's Indigenous Team discussing Indigeneity and gender liberation with Mea Johnson and Micah Weir. The working group has organized a showing of "Red Fever: The Indigenous Influence on Western Culture" and a discussion with Harvard professor Philip Deloria (Sioux Dakota). Through this working group, First Parish is hosting a benefit concert for the North American Indian Center of Boston which is in need due to federal funding cuts. IJWG has commissioned a Native American artist to create Indigenous beading artwork to highlight the framing of our Land Acknowledgement.
 10. The Peace & Justice in Israel Palestine Working Group organized events including a book discussion with Professor Linda Ditmar, a showing of The Voice of Hind Rajab and an upcoming conversation with political economist and scholar Sara Roy. The group sponsored the Holiday Bazaar at First Parish that raised money for Gaza in December. Members also connected with other UU congregations about this issue, as well as established ties with the UUJME (UUs for Justice in the Middle East).
 11. The Climate Action Group worked with UU Mass Action's climate advocacy program and independently to lobby for climate issues important to First Parish. As well, the group assisted in helping First Parish to look into climate-friendly solutions to some of our facility needs.
 12. UU Urban Ministry continued to build connections between First Parish and the Roxbury Community. First Parish members' participation in its tours and education programs grew in 2025. First Parish began a partnership with the UUUM Roxbury Youth Programs (RYP) through its Reckoning and Repair initiative (detailed in the RJCC portion of this report). First Parish continued its custom of donating its 2025 Christmas service offerings to the UUUM Renewal House domestic violence shelter (~\$5,000). Robin Baker and Marc Jacobson, both with strong ties to the UUUM, were appointed delegates in 2025. After many delays, the restored historic meetinghouse re-opened in March 2026. Priority for the coming year is to increase participation in Roxbury-based UUUM programs.
 13. ArCS has supported several households throughout the year and worked to help graduates during this difficult year due to the cut in SNAP benefits and increased ICE activity. ArCS' parent group RIM celebrated its 39th anniversary and First Parish hosted a fundraising dinner.
 14. (Note: I believe this group submitted its own report, if so, please omit this description in the Social Justice Report) The LGBTQIA+ Affirming Committee hosted the Rainbow Coalition of Arlington's Transgender Day of Resilience & Remembrance vigil, showed the film "Every Body," and held a discussion following, held the

Arlington Rainbow Commission's Trans Joy Cafe to celebrate the Trans Day of Visibility and is starting to organize First Parish's involvement in this year's Boston Pride Parade.

Stewardship Committee

Contact: stewardship@firstparish.info

Purpose/Mission: Plan and implement the annual First Parish Stewardship drive, which is the source of 70% of our operating funds. First Parish depends on the generosity of our congregation to pay our staff, maintain our spaces and continue our rich programming. Our 2026 campaign theme "Upholding What Matters" reflected the many reasons people choose to belong to and support First Parish. What matters to each of us may be different, but together we are bound by shared purpose and love at the center of our community.

Members:

- Joel Carlton-Gysan, Chair 2 yrs (leaving committee)
- Emily Balkam 1 yr (leaving committee)
- Megan Rising 1 yr (leaving committee)
- Katherine Fleming Event lead (consultant)
- James Fleming Event lead (consultant)
- Julius Pereli Event advisor (consultant)
- Rev. Erica Richmond

Note: The Stewardship Committee continued using a mix of term members and "consultants" brought in for specific tasks. This approach has proven effective, as some responsibilities are well suited to short-term contributions.

Major activities:

- Planned and organized campaign, including several events to increase engagement:
 - Two small donor consultation dinners (invitation only)
 - Stewardship/RE pizza and game night (to include families)
 - Congregational lunch
 - Evening gathering for parents of Youth, COA, OWL
- Raised \$772,211 from 252 households as of April 10. This was 92% of our financial goal and 90% of our participation goal. This was also 95% of the amount raised last fiscal year (the largest amount ever) and recorded three weeks earlier than last year due to earlier Congregational Meeting.
- We continue to send January New Year's Cards to all prior year donors thanking them for contributing to our thriving community.
- New for this year, we had two small donor consultation dinners in January to get feedback and earlier commitments from annual supporters. This was a test and might be an opportunity to grow next year.
- New for this year, we also had asked committee and group leaders to email their members with a video message from the interim minister and short testimonials from members.

Trustees of the First Parish Trust Funds

Contact: trustees@firstparish.info

Mission: The purpose of the trust funds is to ensure that over the long term, First Parish Unitarian Universalist of Arlington (“FPUU”) thrives. The trust funds support the FPUU community in realizing its goals through provision of financial support to FPUU. The Trustees must manage any competing goals of disbursement from the trust funds in a predictable manner, while maintaining and growing the endowment to ensure that this financial support can be sustained.

The trust funds are currently managed by Trillium Asset Management, an investment firm that “focuses on positive integration of material quantitative and qualitative ESG* (environmental, social and governance) data that socially conscious investors use to screen potential investments.” Trillium’s clients include many non-profit organizations similar to First Parish.

The trust funds include an unrestricted General Fund as well as restricted funds. Restricted funds managed by the Trustees must be distributed and used in accordance with restrictions as set by the donors. The primary restricted fund is the Damon Wellington Fund, which resulted from the sale of the previous parsonage and partially funds the Ministerial Housing Allowance.

The primary means through which disbursement from the unrestricted General Fund is provided to FPUU is through quarterly disbursements in support of its operating expenses. The Trustees pledge the amount of this contribution in advance of the annual budget based on a guideline of 3.0% of the average total value of the General Fund over the prior 20 quarters. This percentage is consistent with Trillium’s recommendation for funding operations while preserving and gradually growing the endowment. This practice is designed to give the Parish Committee and Finance Committee flexibility in prioritizing the use of these funds as they prepare the annual budget. The same formula is also used for calculating the annual disbursement from the Damon Wellington Fund. For Fiscal Year 2025-2026, the trust funds are providing FPUU \$63,200 from the General Fund, and \$28,000 from the Damon Wellington Fund.

The unrestricted General Fund may also from time-to-time be used for long-term capital projects. Funding from the trust funds has been used to “seed” fundraising for capital campaigns organized to fully fund these projects. Requests to the Trustees are typically initiated by the Parish Committee

Financial Update

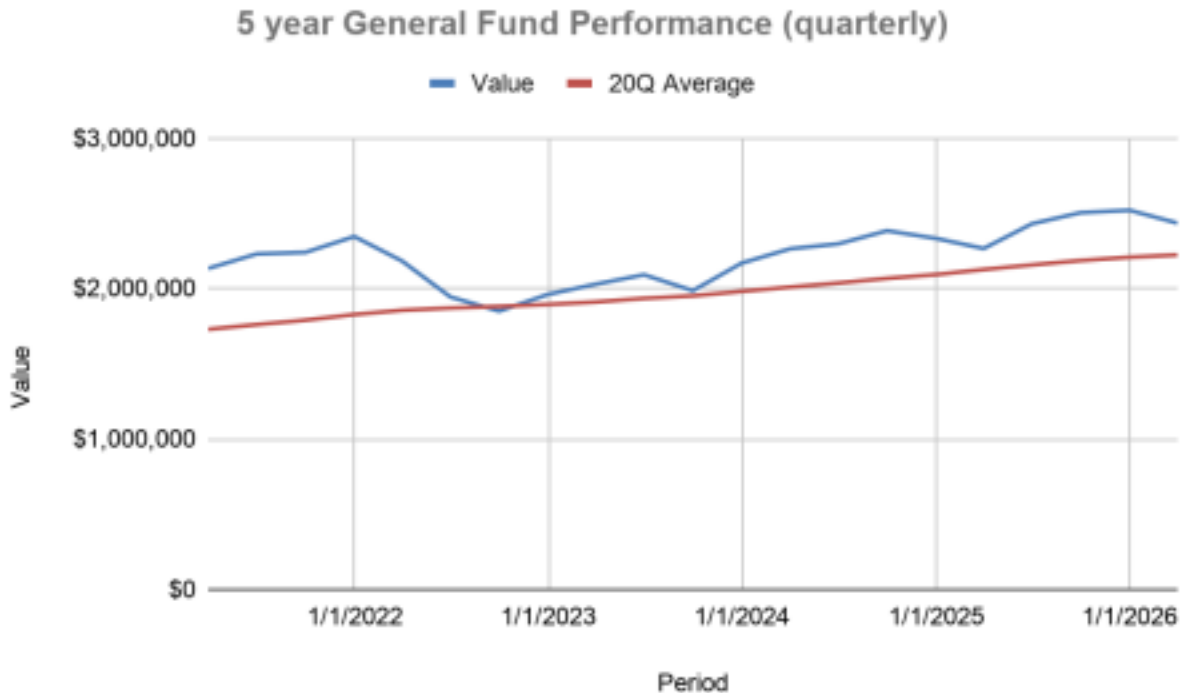
This year the trustees continued to work with Trillium Asset Management to ensure that our investments align with our values as a community and reflect the current fiscal environment. The 2026 annual contribution was based on providing 3% of the unrestricted funds and 3.0%

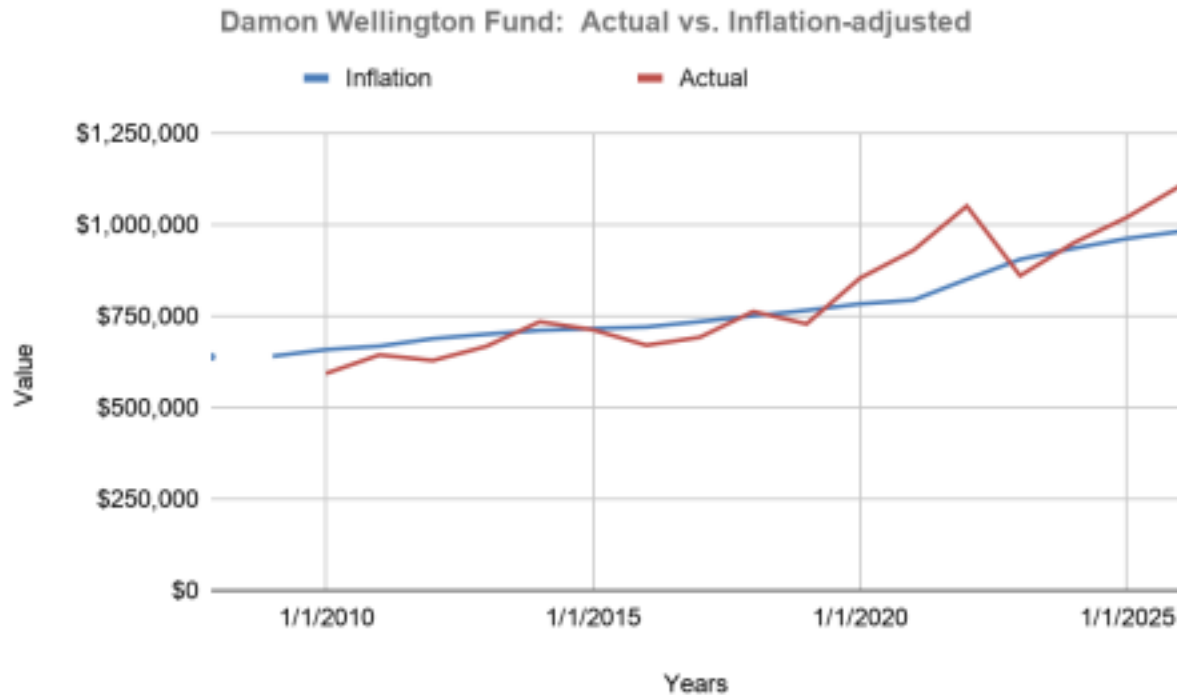
of the Damon Wellington Fund based on their average values during the previous 20 quarters. The trustees' goal is to maintain the value of the Damon Wellington fund to keep pace with the Consumer Price Index.

Our total assets under management by the Trustees as of 3/31/2026 are valued at \$3,584,557 with:

- \$2,434,805 in the General Trust Fund (for unrestricted use)
- \$1,066,147 in the Agnes Damon Wellington Fund (restricted to use for ministerial housing)
- \$83,605 in restricted use funds (Tobey Fund; Cook, Smith and Teele Fund; Social Justice Fund)

The value on 12/31/2025 was \$3,712,960 which represents an 8.20% rate of return for 2025, while the year to date for Q1 2026 has been -3.5%.





Note: The Damon Wellington chart is not updated for 2026 as the CPI has not yet been published for that period.

A part of First Parish’s legacy are several items of historical significance. These items include some pewter and silver “communion-ware” that were being stored at Cambridge Savings Bank in Arlington. CSB recently requested that this collection be removed from their premises. This precipitated a re-inventory of all such items known to be in FP’s possession. The items include the following:

- **Silver, silver plate and pewter communion ware:** Overall appraised value Sep. 2012 is \$16,870.
- **Coins and a button from the lead cornerstone box of the 4th meetinghouse:** Overall appraised value January 2013 is \$1,979.
- **Thompson & Small Pulpit Bible of 1798:** Fair market value Oct. 2012 estimated at \$5,000 - \$6,000. On loan to Andover-Harvard Theological Library.
- **Silver tankard c. 1769 from the communion-ware collection, brass buckles and strap ends from a Royal Artillery ammunition pouch, stocking fragment, button, tooth, piece of a cartridge box, and flint:** On loan to Arlington Historical Society until 2029. Overall “declared” (not appraised) value is \$16,000.

Committee, Group, Program and Team Reports

Aging Well

Contact:

<mailto:agingwell@firstparish.info>

Purpose/Mission:

The goal for this group is to foster engagement and build community among women over fifty (or those identifying as women) who wish to explore themes related to planning and consciously living out our later years. Our meetings include small-group or large-group discussions on topics of interest, and presentations by occasional guest speakers. Originally founded and led by Kit Harrison Hayes, the group has existed for over two decades.

Aging Well meets on the fourth Thursday of the month, from 11:00 to 12:00 on Zoom. We occasionally hold meetings in person, and sometimes break for July and August.

Steering Committee Members: P.J. Gardner, Cindy Stimpson, Cindy Primett

Major activities:

Our recent meetings included reflections on “Finding Our Holiday Spirit”; discussions about our favorite songs and books; a presentation on “Woman of Courage and Conviction” by author and member, Dorothy Anger; and a presentation on the wisdom of Buddhist monk Thich Nhat Hahn on conflict and conflict resolution.

Challenges or improvement opportunities:

Our attendance has decreased lately.

2026-27 Priorities:

We’d like to increase participation and ensure that our programs are of interest to potential attendees.

Transitions Team Committee

The Transition Team was appointed by the Parish Committee in August 2025. Nominations were solicited at the end of the 24-25 church year following Marta’s announcement of her retirement effective June 2025. The First Parish members on the committee are Marilyn Downs, Lois Fine, Julie Garry, Marc Jacobson, Lida Junghans and Kay Snowden as well as our Interim Lead Minister, Reverend Jonipher Kwong.

The charge of the Transition Team is to support and promote the work of this interim ministry period to prepare our community for a successful new settled ministry. This is a time to examine how and what we’re doing as a congregation and to engage in dialog to improve our systems and processes.

The Transition Team has organized a number of events to address specific issues, solicit feedback from the congregation, and support our community through this transition period. Our practice for each event is to host both an in-person gathering at church and a zoom session for online participants.

October 19 and 21 – Listening Sessions, focused on changes in worship introduced in the fall

December 13 and 14 – Conversation with the Ministers: their roles, collaboration and use of honorifics

February 22 and 26 – Common Ground: What Connects and Sustains Us, facilitated by Hilary Allen of the UUA

March 22 through 31 – Listening Circles (11 circles), small group reflections on 1) the aspects of life at First Parish which are most nourishing and engaging for us and 2) our challenges and feelings about growth and change

April 19 and 27 – Transition Team Update, including 1) setting the stage for upcoming gatherings around staffing structure and development of a First Parish covenant (informed by our survey of 12 similarly-sized congregations), 2) an update on the transition and search process going forward, and 3) reporting back on the March listening circles.

In addition to these congregation-wide events, we encourage feedback at any time. We provide periodic updates to the Parish Committee on what we're hearing and strive to keep the congregation informed of our activities through Transition Team Newsletters and other communications.

Our work on developing a covenant and considering alternative staffing structures will continue in the fall. We will also be working closely with the Lead Minister Search Committee to clarify our respective roles and support the work of each other. Our work in year 2 will consider other areas which are critical to strengthening our congregation.

Respectfully submitted,

Transition Team

Art Exhibition Committee

Contact: artshow@firstparish.info

This year the Art Team organized four art shows, representing works in a variety of two and three dimensional media by many First Parish artists. Artwork was displayed in the Parlor, the wall outside the Parlor entrance, and in the Narthex display case. Opening receptions for each

show were widely attended. Two shows featured solo artists and two were congregational shows with special themes, open to all First Parish artists. Ten percent of all art sales are donated to First Parish.

- **Dialogue: listening to nature** September 21 - November 16, 2025. Solo show of painting and collages by Patricia Crotty.
- **Congregational Show** December 7, 2025 - February 2, 2026. In this unthemed show, First Parish artists submitted work in a variety of media, including drawing, painting, photography, fiber, collage, mixed media and sculpture.
- **Where I've Been; What I've Seen** February 8 – April 10, 2026. Solo show of photographs by Peter Southwick.
- **Congregational Show: Hope and Resistance in Difficult Times** April 12 - September 4th. First Parish artists were invited to consider how the current political climate is affecting their art, and in what ways hope or resistance are expressed through their creative process.

Members: Nancy Crasco, Marilyn Downs, Peggy Gardiner, Michaela Kirby, Steph Miserlis, and Jim Ptacek

Blood Drives at First Parish

Contact: blooddrides@firstparish.info

Chair: John Hodges

We hosted over 200 donors at our drives in November, December, two in January, and March, all in the vestry this year, none in the sanctuary. We experimented with a Tuesday drive and two in a month. Our limited success suggests one a month on Wednesdays is a better service to our community.

This total for the year is a significant drop compared to prior years for us due to fewer, smaller drives. Years ago First Parish was recognized as the most outstanding sponsor in the Commonwealth for the size and frequency of our drives. Volunteers able to commit to a more frequent schedule and the more demanding set up and clean up required to use the sanctuary are needed to increase our service level. My own limitations of time in the fall, on Saturdays, and ability to safely continue to do solo full sanctuary chair and table moving have curtailed our use of the sanctuary.

Next program year we have three drives scheduled so far, September 30th, October 28th, and December 5th, again all in the vestry. We hope to schedule more in 2027. Note the September and October drives are another experiment, relying on the office staff to ensure the door is unlocked for the ARC staff and assisting as needed for the day. I anticipate being unavailable for both. I anticipate being present for the December drive, and for future 2027 drives to be scheduled. I truly would welcome your help!

For those who don't know me or haven't heard, I'm a 49 year ARC volunteer and a 669 time and 1,580 unit whole blood, platelet, and plasma donor. I've organized drives facilitating hundreds of thousands of donors giving the gift of life. Recently I was named a Massachusetts Hero by the ARC:

<https://youtu.be/eRk8itCNVyY>

Thank you to the congregation, leadership, volunteers, and staff for your support through the 26 years we've been doing this, and on into the future!

John Hodges, blooddrive@firstparish.info

Covenant Groups

Contact: covenantgroups@firstparish.info

Purpose/Mission:

Covenant groups are composed of up to nine First Parish people who meet once a month to get to know one another, and themselves, in a deeper way. In covenant groups, we listen carefully to each other and come to understand each other across generations, identities and circumstances. Together we form connections, enrich each other's lives, reflect on our own experiences and perspectives, and strengthen the fabric of this congregation.

Meetings follow a format that includes a brief check-in, structured sharing on the monthly theme, and closing reflections. Members commit to meet with their group monthly from September through June.

Chair: Kate Lenox

Committee Members (Covenant Group Conveners)

Katherine Fleming	2nd Sunday
Monique Chaplin	2 nd Wed pm Zoom
Anna McMaken-Marsh	2nd Tues
Jessica Farman	2nd Tuesday
Amy Hadley	2nd Wed
Tina Silberman	3rd Tuesday
Kate Lenox	3rd Wed
Peter Heller	3rd Wed Hybrid
Joanna Pushee	4th Sunday Zoom

Major activities:

- Total participation for September, 2025 through June, 2026 is currently 82 members.
- There are 9 groups. Six groups meet in person; two groups meet by Zoom only and one group uses a hybrid model (meaning members can join either in person or via Zoom).

Challenges or improvement opportunities:

- In spring of 2025, we added a “learning moment” component to our monthly Convener Group meetings. We have continued that practice throughout this year. Conveners take turns identifying a topic and facilitating the discussion. They have reported that these discussions have been instrumental in fostering their development as conveners and recommend that we continue the practice.
- Thanks to Carolyn Hodges who has taken the lead in resolving an ongoing issue where conveners often found the Damon room in disarray when they came for meetings. We are optimistic that a solution has been found via the new lease negotiations.
- As the Coordinator for Covenant Group, Kate Lenox took on the task of better documenting processes for new member recruitment in order to be better able to share the administrative load for identifying and on-boarding new members. We will be field-testing these procedures during our recruitment process for the 2026-2027 Covenant Groups.
- We will continue to strengthen the connection with our ministerial sponsor so that he or she can provide guidance for good group practices—and support for individual members as needed.

2026-27 Priorities:

- We expect to have some transition in conveners so a priority will be to ensure a smooth transition and robust on-boarding to our new leader(s) so they can integrate seamlessly into the Convener group.
- Engage more of the Conveners in the recruitment efforts for new members.
- Ensure Covenant Groups continue to play a central role in helping to maintain community at First Parish. Since we regularly touch over 80 members/month, Covenant Groups help keep a pulse on the needs of the congregation and serve as a bridge to other parts of First Parish, especially in the midst of the transition to a new settled minister.

Contact: covenantgroups@firstparish.info

Ferry Beach Retreat Planning

Contact: ferrybeach@firstparish.info

Purpose/Mission:

The mission of the Ferry Beach Committee is to organize and conduct a safe, accessible, fun, relaxing and enriching multi-generational retreat weekend for our congregation at Ferry Beach on the coast of Southern Maine. It is the goal of the committee that all in our congregation feel welcome and included, and that Ferry Beach remains an excellent opportunity for members of our congregation to make new friends and connections.

Chairs: Mike Rie and Monique Chaplin

Committee members (including years on committee):

- Monique Chaplin (2019-present)—co-chair
- David D’Antonio (2018-present)
- Mary McCartney (2023-present)
- Mike Rie (2018-present)—co-chair

Major activities:

- Organized, marketed, and hosted a weekend-long retreat at the Ferry Beach Retreat and Conference Center October 3-5, 2025.
- Remained in contact with Ferry Beach throughout the year to determine registration strategies and expectations.

Retreat highlights:

- 113 people (ages <1 to 82) registered for the retreat, and all but one attended.
 - We were thrilled to have a crowd this large after not having had a retreat at Ferry Beach since 2023 (and we attracted some first-time Ferry Beach retreatants, possibly encouraged by the meetinghouse-based one-day UnFerry Beach Retreat which was held in 2024).
- With the support of the Youth Group coordinator, K. Milano, Rev. Stevie, and a number of adult chaperones, the Youth Group held their own “retreat within the retreat”. It was a tremendous success! They plan to do it again next year.
- Members of the Youth Group MC’ed and facilitated the annual Talent/No Talent Show and numerous attendees coordinated activities throughout the weekend.
- Twelve scholarships were given, for a total of \$1459. Our registration revenues generated enough funding to cover 100% of the scholarships in 2025 and we did not have to dip into the Ferry Beach Reserve Fund. Additionally, we generated a \$302.97 surplus that was added to the Reserve Fund. Historically, the Reserve Fund has been utilized to be able to cover the registration deposit, membership fee, and the majority of the Scholarship’s offered each year, mainly facilitated by adding \$10 to each meal plan. As a point of reference, we provided \$876 in scholarships in 2023, the last time we had a retreat at Ferry Beach.

Challenges or improvement opportunities:

- For 2026, Ferry Beach assigned us the weekend of September 25-27 for our retreat (a week earlier than in 2025). They require final registration numbers two weeks ahead of the retreat date, which is September 11. Because Ingathering does not occur until September 13, 2026, the Committee will not have opportunities to market the retreat in-person to the congregation (except during one Potluck during the summer break) after mid-June. We hope that marketing through other channels (eBulletin, Connection

Board, Facebook group, Spire) will suffice to encourage people to register throughout the summer.

- Ferry Beach is hosting another group on the same weekend as our retreat (whose attendance numbers are not yet known). To that end, registration for the 2026 retreat opened in early March, to give people ample opportunity to register for their preferred accommodation. However, many folks are not clear on their fall plans this early in the year. We may not be able to accommodate all interested parties, if the other group sharing the facility registers more quickly than our members do.
- Because registration costs continue to rise, and we wish to continue to make the retreat accessible to all, Rev. Erica proposed that the Ministers' Discretionary Fund cover 50% of the scholarships awarded, up to a cap of \$1500, to support scholarships for 2026. For the 2026 retreat, we will add a smaller amount to the meal plan registration fees (\$5 for adults and youth, \$10 for children), to help cover scholarships, and supplement if needed by the Ministers' Discretionary Fund. Thank you so much for this support!
- Because this was the first year having Ferry Beach manage registration in-house, we did not have the functionality of Realm to communicate with all attendees. It will take more effort on the part of the Committee to encourage people to make use of the retreat Google Group to plan carpools, activities, and general communication with all attendees.
- We received feedback from our post-retreat survey that new attendees would like more explicit information about the workings of the retreat at the Welcome reception, as well as more structured opportunities for ice-breakers and getting-to-know-you activities.

2026 Priorities:

- To encourage members of the congregation to register early for the 2026 retreat, as we are sharing the facility.
- To enhance communication between attendees in the weeks leading up to the retreat.
- To onboard the new Committee member—welcome, Annelise Aminoff!
- To encourage additional members of the congregation to join the committee.

Lay Ministry

Contact: Layministry@firstparish.info

Mission: The mission of Lay Ministry is to help extend the pastoral care of the ordained ministers by providing emotional and spiritual support to people who attend First Parish. In addition, Lay Ministers provide and facilitate practical support in the form of meals, care packages, and general errands through the Wider Network of Care.

Chairs: Carolyn Carlson (co-chair; third term ends Sept 2026), Greg Ruccio (co-chair; third term ends Sept 2028)

Committee Members: Christa Kelleher (third term ends Sept. 2028), Robbie Rinearson (second term ends Sept. 2027), Jeanne Feeley (first term ends Sept. 2026), Julie Garry (first term ends Sept. 2026), Dawn Terkla (first term ends Sept. 2027).

Major Activities

- Lay Ministry met monthly at First Parish with the participation of Rev. Erica Richmond and then planned to meet with Rev. Carolyn Patierno while Rev. Erica was on sabbatical (May and June 2026). Our meetings consisted of reviewing current and new needs, and identifying members who are experiencing the anniversary of the loss of a loved one. During meetings, Lay Ministers were assigned congregants to reach out to by writing cards, making phone calls, or writing e-mail messages.
- Lay Ministry managed the worship ritual of marking and sharing joys and concerns, which underwent some changes this year such as having ministers read chat messages aloud and adjusting the script to focus on the spiritual support that lay ministers provide. Reached out to congregants expressing deep sorrow and hardship through spoken and online chat sharing.
- Lay Ministry provided support for numerous congregants over the course of the year for concerns ranging from spiritual support, to helping after surgeries and emotional support after the death of a loved one. This included the distribution of prayer shawls.
- Lay Ministry coordinated the support of the Wider Network of Care to individuals in the community. The Wider Network of Care provided meals, errands, and care packages.
- Lay Ministers make it a point to attend special services throughout the year such as Embrace the Darkness (usually the second week of December) and memorial services, in order to be on-hand for congregants who might want spiritual support before or after the service.
- In November, lay minister Julie Garry organized a get-together on the day before Thanksgiving to create some community for congregants who might want to feel more part of something around the holiday. She and other lay ministers organized pies and drinks and had a very good turnout (about 3 dozen people). She intends to replicate the effort next year, with more advance planning including soliciting donations from local bakeries.
- Lay Ministry continued to organize and facilitate the Grief Support Group (fourth Tuesday). Transition to Retirement continues with consistent attendance but is no longer facilitated by Lay Ministry.

Challenges

- We anticipate that recruitment will continue to be a challenge. While we do currently have seven lay ministers, Carolyn Carlson will be rotating off in September after 3 two-year terms. The Committee on Shared Ministry has been instrumental in helping to identify and recruit potential new ministers. This effort included a service on March 29 dedicated to highlighting the efforts of pastoral care as a volunteer effort.
- Lay Ministry continues to use the Wider Network of Care email group, widernetworkofcare@firstparish.info, generated to meet the challenge of efficiently finding volunteers for services. The email group allows the Lay Ministry liaison to the WNC (switched monthly) to contact all volunteers who have signed up for the WNC in a single message in response to a need. Lay Ministry is infinitely grateful to all the WNC volunteers who have eagerly provided care services to members in need.

'26-'27 Priorities

- Recruit new lay ministers
- Increase the number of Wider Network of Care volunteers
- Plan and implement a refresher training for the LM committee in Fall 2026

Memorial Garden Committee

Contact: memorialgarden@firstparish.info

Purpose/Mission: The Memorial Garden Committee oversees the First Parish Memorial Garden and Remembrance Corner.

Chair: Barbara Tosti

Committee members (no term end dates): Anne Quaadgras, Greg Ruccio, Carol Seitz, Sue Sheffler, Allan Tosti

Major activities:

- There were two burials in the Memorial Garden this year, bringing the total to 34. An additional 32 people have prepaid for burial in the Garden. The current fee is \$600. All fees are used for maintenance and improvements.
- Anyone wishing to bury ashes in the Memorial Garden can read the rules and procedures, available on the First Parish website or in printed form. A completed form should be submitted to the Memorial Garden Committee and the fee to the Office Manager.
- Members of the Memorial Garden Committee assist families in choosing their burial location and with the process of burial.
- Names of those buried in the Memorial Garden may be added to the bronze plaque mounted on the adjacent exterior wall at an additional cost.
- The Committee maintains a Memory Book in which loved ones can create a remembrance page of pictures, words, artwork, etc. for each person whose ashes are buried in the Memorial Garden.
- The Committee maintains a Memorial Garden map and list of all burials on one of the pillars between the glass sections of the vestry wall facing the Memorial Garden.
- The Remembrance Corner provides a place for engraved pavers honoring people, groups or ideas. New pavers are installed when enough are ordered to cover the cost of engraving and installing. We added new pavers in the summer of 2023.

2026-27 Priorities:

- Continue to assist First Parish members and friends who wish to have their own or loved ones' ashes buried in the first Parish Memorial Garden or add pavers to the Remembrance Corner.
- Update the posted Memorial Garden map and list in the vestry as ashes are buried.

Submitted by Barbara Tosti
 abtosti@outlook.com

Men's Group

Contact: mensgroup@firstparish.info

Purpose / Mission: The First Parish Men's group provides a forum for the men at First Parish in which we help each other with spiritual, emotional, and personal questions and concerns. Discussion themes often interweave questions of security, identity, authenticity, and purpose. Themes are not prepared in advance. We provide a place where men can share their lived experience and hear others in a small-group community.

Our structure involves a check-in followed by discussion of issues that emerge from the check-ins. There are no attendance requirements although continuity benefits everyone. Attendance varies from two to twelve people. We are looking for additional participants who'd like to build our community and help strengthen bonds at First Parish.

During the pandemic we moved our meetings to Zoom and added more participants. Zoom has proved useful and convenient.

We meet every other week on Sundays from 7-8:30 PM. For more information, meeting dates, and location please send an email to mensgroup@firstparish.info.

Chair: David Dreyfus

Shared Ministry

Contact: sharedministry@firstparish.info

The primary responsibility of Shared Ministry is to recruit candidates to become Lay Ministers and Worship Associates. Those who are interested submit applications and references that the committee reviews with First Parish clergy. Lay Ministers and Worship Associates serve for a maximum of three two-year terms. There is a comprehensive training in the fall (full days for both Lay Ministers and Worship Associates); new members are installed at a Sunday service. The current membership of Shared Ministry includes Cathy Modica, who serves as chair, Annette Sawyer, and Amy Anderson.

This year the chair of Shared Ministry has continued a practice of connecting with both Lay Ministers and Worship Associates, focusing on those beyond their first year, for one-on-one

conversations designed to hear individual feedback on how the programs are working, and on what support Shared Ministry can provide to individual Lay Ministers and Worship Associates.

Shared Ministry plans to continue a tradition started in the previous church year of hosting a dinner for the members of each program in the spring, to thank the Lay Ministers and Worship Associates for their important contributions, and to hear each group's thoughts about the ongoing needs of each program.

A new initiative for this committee this year was the organization of a lay-led volunteering-focused service, "Leading With Love," conducted on March 29. Shared Ministry partnered with Leadership Development to create the service, which included reflections from two current Worship Associates and one current and one alumnus Lay Minister. The theme of devoting time and talent to support the work and the members of First Parish was woven throughout, and interest sheets collected that day yielded at least a few new expressions of interest in joining a ministry group or other committee. Anyone who expressed interest in a specific area will receive outreach from either Shared Ministry or Leadership Development.

We are very fortunate that most of our current Lay Ministers will be serving for at least another year. Returning will be Christa Kelleher, who has volunteered to serve for a third term; Robbie Rinearson, with one more year to complete on a second two-year term; Jeanne Feeley and Julie Garry, both of whom will begin a second term in fall 2026; and Greg Ruccio, who is currently completing four years as a Lay Minister but has volunteered to stay on for one additional year. Dawn Terkla will be stepping off, and chair Carolyn Carlson will be leaving Lay Ministry after six years of devoted service. We are deeply thankful to Carolyn for her extensive service.

In the Worship Associates, an increase in interest in this program allowed us to add three new WAs to the program this year: Mary Babic, Lyn Fulton-John, and David Klingsberg are all completing a first year of service, and each has brought a welcome new voice to the pulpit. They joined Mary Breen and Lillian Povey, each of whom will start a second two-year term in fall 2026. Loren Gomez and Bill Licea-Kane have each completed four years but have agreed to stay on for a third two-year term starting this fall.

Applications will be available for possible new Lay Ministers and Worship Associates, and interviews will be conducted, in late April and May, with the goal of recommending any new members to First Parish clergy by the end of May.

Cordially,

Cathy Modica
Chair, Committee on Shared Ministry

2026-27 Lay Ministers:

Jeanne Feeley (starting first year of second term fall 2026)
Julie Garry (starting first year of second term fall 2026)
Christa Kelleher (starting first year of third term fall 2026)
Robbie Rinearson (starting second year of second term fall 2026)
Greg Ruccio (starting fifth/final year of service)
Carolyn Carlson (rotating off after completion of third term, spring 2026)

2026-27 Worship Associates:

Mary Babic (starting second year of first term fall 2026)

Mary Breen (starting first year of second term fall 2026)

Lyn Fulton-John (starting second year of first term fall 2026)

Loren Gomez (starting first year of third term fall 2026)

David Klingsberg (starting second year of first term fall 2026)

Bill Licea-Kane (starting first year of third term fall 2026)

Lillian Povey (starting first year of second term fall 2026)

Spirit Talks

Contact:

spirittalk@firstparish.info

Purpose/Mission:

The mission of Spirit Talks is to provide an opportunity for people to share and reflect with each other each week over Zoom. We begin with a check-in and spend the majority of the meeting reading quotations on a particular spiritual topic and responding to related questions. It is similar in format to Covenant groups, except that it meets more frequently. Volunteers from the group provide the topics and questions each week.

We meet every Monday from 4:00 to 5:00 PM on Zoom.

Facilitator: P.J. Gardner

Major activities:

Providing topics on spiritual subjects and a chance for people to connect in an intimate setting.

Challenges or improvement opportunities:

Concern about how to manage the size of the group if more members join. In that case, we might have to create another meeting time for new members. We normally have regular attendance by less than a dozen people, which is perfect.

2026-27 Priorities:

To continue to provide meaningful topics for discussion and give participants a way to connect from their homes. We would like to continue the strong connections we have forged since the COVID pandemic.

Worship Associates

Contact: worshipassociates@firstparish.info

Purpose/Mission: The Worship Associates are members of First Parish, interviewed and selected by the Shared Ministry Committee to serve up to three two-year terms. We are charged with working with our ministers to bring our individual voices, perspectives, and beliefs to the First Parish pulpit, as well as taking a leadership role in our collective worship life as one of the key ways ministry is shared within our community.

Chair: Loren Gomez (second term ends fall 2026)

Committee members:

Bill Licea-Kane (second term ends fall 2026)

Lillian Povey (first term ends fall 2026)

Mary Breen (first term ends fall 2026)

Mary Babic (first term ends fall 2027)

David Klingsberg (first term ends fall 2027)

Lyn Fulton-Jon (first term ends fall 2027)

Withdrawn Committee membership:

David Whitford (second term ended fall 2025) Left in January 2026

Major activities (bulleted list):

- In-person Fall 2025 Retreat for in-depth discussion of topics relating to worship led by Reverend Jonipher. Trained 3 new Worship Associates and re-wrote our covenant.
- Monthly meetings to consider past services, prepare for the upcoming services, discuss issues relating to worship raised by staff and members of First Parish, and reflect on how best to craft intentional, transformational worship services.
- Learned to improve our communication with the congregation via the Transition Team
- Implemented with Reverend Jonipher's leadership, a new Unified Script, which is used for all worship services.
- Crafted two new non Sunday morning worship services: El Dia de Los Muertos (October) and Winter Solstice service (December), in coordination with First Parish members.
- Coordinated and participated in two lay-led services: Poetry (January) and Volunteer Sunday (March)
- Spring 2025, recruited, trained and supported 12 online summer lay leaders- Three were led by Worship Associates! Each WA served at 2-3 summer services. All Worship Associates attended the 2 hour virtual training session with Marta.
- Calendar year: Each Worship Associate was on duty for 8-10 services each throughout the calendar year, covering Sunday worship, Embracing the Darkness, Christmas Eve service, as well as memorial services. Typical Worship Associate Sunday morning tasks consist of coordinating with the minister or worship leader, writing welcome, chalice lighting and/or prayers and setting up the sanctuary for worship.
- Facilitated the transition from volunteer tech team from our congregation to professionally hired tech for Sunday virtual services. Supported and advised Allison and Reverend Jonipher in converting the volunteer tech script to the Unified Script.
- Hosted a potluck (April)

- Recruited and supported three credo speakers from our congregation for the Credo service.
- Organized 12 weekly summer potlucks for the First Parish community to gather in person during the summer. Potluck attendance ranged from 35-65 people each week. A different committee hosted the potlucks each week.

Challenges and opportunities for growth:

We said our goodbyes to Marta in June. It was exciting to meet and get to know our interim minister Reverend Jonipher. During this transition time, we are learning new ways to conduct and craft a worship service, make small or large changes, and skillfully communicate these with the congregation. It has been a challenge, but we are a strong team and are learning as we go.

2026-2027 Priorities:

- Continue to work with our interim minister Reverend Jonipher to create meaningful worship in each service, with our thought towards the service as “one long prayer”.
- Lead a successful summer of 6/12 lay led, online-only services and in-person potlucks.
- Experiment with screens in the sanctuary during three hybrid services in the summer 2026, Rev. Jonipher preaching.
- Prepare for a new settled minister by becoming clear in our mission and our covenant.

Ushers

Contact: ushercoordinator@firstparish.info ; ushers@firstparish.info

Purpose / Mission: Ushers are present at Sunday Services to welcome people and help them find their way; we prepare Sanctuary seating & hymnals for worship, and keep an eye out for safety; we count attendance and collect the offering. We assist the Ministers and Worship Associates as needed, to allow the service to run smoothly.

Coordinator: Kate Tranquada

Ushers active 2024-2025:

Ann Abbott
 Tali Avery
 Ellen Vliet Cohen
 Jeanne Feeley
 Lois Fine
 Marc Fredette
 Linda Grosser
 Lori Kenschaft

Arleen Kulin
Brian Miller
Rachael Stark
Al Tosti
Barbara Tosti
Kate Tranquada
Maryglenn Vincens
Jane Voytek

Xmas Eve:

Liz Blumenthal
Judy Dyer
Aaron & Leon Kitzmiller
Fae Kramer
Lynn Rosenbaum
Tina Schultz

Major Activities

- A team of 4-5 ushered every Sunday morning this program year.
- We had a total of 14 to usher at two Christmas Eve Candlelight Services. Ushers managed the retrieval, preparation, distribution, dismantling and storage of candles and holders for both services.
- We hosted a Wednesday evening potluck in the summer.

Priorities for the coming year

Ushers would still like to spark the return of annual emergency evacuation drills. We will work with the ministers on this.

Turning Outward Groups

Alliance

The Women's Alliance of First Parish Unitarian Universalist, Arlington, MA

Contact: alliance@firstparish.info

Purpose: To provide occasions for those who identify as women at First Parish to meet for fellowship, to deepen their intellectual and spiritual lives through programs that explore topics of value to women, and to engage in service projects. Alliance Giving Plans are reviewed by members every 3 years. The Alliance provides financial support to local, regional, national, and global charities that help women and families through difficult transitions as well as to First Parish, the Unitarian Universalist Service Committee, and the Unitarian Universalist Women's Federation.

Alliance Board Members:

President:	Andrea Winslow
Vice President:	Nina Duncan
Secretary:	Robbie Rinearson
Treasurer:	Kay Snowden
Trustee:	Tina Silberman (expires 2025-26)
Trustee:	Anne Ehlert (expires 2027-28)
Programs:	Pamela Baldwin
Membership:	Anne Ehlert
Hospitality:	Caryn Sandrew
Communications:	Tina Schultz
Friendly:	Lisa Heisterkamp Davis
Tech Assistance:	Cheri Minton

Programs:

- October 24, 2025, Movie, Left on Pearl, and panel discussion
- December 19, 2025, Dinner Church with Aisha Ansano
- January 9, 2026, Chowder Supper/Discussion of 3 Year Giving Plan
- February 27, 2026, An Evening with Katherine Power, peace activist and author
- April 12, 2026, Alliance Sunday, Alexandria Russell, guest preacher
- May 15, 2026, Alliance Annual Mtg/Community Dinner/Clara Barton Awards

Other Activities:

- Hosted summer potluck, July 2025
- Cosponsor Transgender Day of Remembrance and Resilience, Nov. 20, 2025
- Collation Hosts at Memorial for Peter Southwick, October 25, 2025
- Donation collection for Household Goods in collaboration with Harvest Moon Fair, Nov. 22, 2025 (The Mad Scramble Squad)
- Special donations to Arlington Eats and the Greater Boston Food Bank
- Made gifts of Charles Grady's History of First Parish to new members, 3/29/26

- Selected nomination of the Cambridge Women's Center for Giving First program, 4/2026
- On site service project with Household Goods in Acton, May 20, 2026
- Donation Drive for Household Goods in collaboration with the St Vincent dePaul Society

Climate Action Working Group

Contact: climateaction@firstparish.info

Purpose / Mission: The Foundational Principles and Mission of the Climate Action Working Group ends with this summarizing statement: We endeavor to display courageous leadership in advocating for moral, spiritual, social, economic, and technological change, so that the community of Earth may have a healthy and sustainable future.

Organizing and planning the group's activities is done primarily by a steering committee. Action alerts and other notices are distributed to the CAWG membership as a whole. There are 102 members on our action alert list.

Activities of CAWG this year have included:

- We participated in lobbying the Massachusetts legislature in favor of a ban on expansion of natural gas distribution infrastructure. We also lobbied against a roll-back climate bill that a committee chair of the Massachusetts House drafted in collaboration with fossil fuel industry representatives and tried to fast-track to passage. These efforts were coordinated through the Mass Power Forward coalition, with UU Mass Action being our primary link to the coalition. With Mass Power Forward partners, we engaged in disruptive demonstrations, including chanting and singing, in the State House. The effort was partly successful – some of the worst elements of the bill were eliminated and some better elements were retained when the bill was passed by the House.
- In collaboration with First Parish's Energy Planner, Lori Kenschaft, we arranged to have an updated assessment of potential enhancements of the energy efficiency of our meetinghouse facilities. The assessment was conducted by a company that contracts with Mass Save. Through a series of interactions with the company, we were able to get a proposal for additional insulation of two spaces, and we promoted the proposal to the Property Committee and the Parish Committee, seeking approval for funds to cover the First Parish portion of the cost of the insulation work. The insulation work would need to be coordinated with replacement of the ceiling of the vestry, a project with its own significant costs.

Financial Reports

Auditor

Contact: auditor@firstparish.info

For the 2025-2026 program year, random internal audits of transactions were conducted to ensure consistency among billing and payment processes throughout the First Parish financial systems. All transactions were verified.

Respectfully submitted, Pam Linov

Chair: Pamela Linov

Treasurer and Assistant Treasurer

Contact: treasurer@firstparish.info

Purpose/Mission:

To maintain accurate and controlled financial records and reporting for First Parish Unitarian Universalist of Arlington.

Treasurer: Carolyn Hodges (2nd term ends 2027)

Assistant Treasurer: Annie Hewitt (2nd term ends 2027)

Major activities:

- Hosted the 2025-2026 Financial Summit, November 2025 to continue coordination with Parish Committee, ministers, Finance, Trustees, Property, and other committees. The group focused on the First Parish transition period noting impacts to the congregation's typical cycle of events. The group emphasized efforts to support community and increase volunteers.
- Prepared monthly Financial Performance Scorecard and Financial Statements for Parish Committee review.
- Close work with Human Resources Committee recommendations regarding revisions/updates to the First Parish employee manual.
- Coordination with Finance committee members to prepare the 2025-2026 budget.
- Re-initiated weekly plate/offering count with volunteers. Grateful for those who have stepped up to help us in this effort.
- ON PAUSE: coordination with Parish Committee sub-groups for a multiyear planning effort "Charting the Course".

Challenges or improvement opportunities:

First Parish continues to thrive! We are extremely grateful for the generosity and commitment of our First Parish community. Thank you all for your timely pledge payments. Your financial commitments provide the foundation for our vibrant community.

THANK YOU AS WELL for your special gifts given to First Parish. Throughout the year First Parish received donations to supplement First Parish revenue; examples include artist contributions resulting from the Art Wall sales, contributions from non-profit foundations initiated by First Parish members, and donations in remembrance of beloved First Parish members.

The Treasurer will review the current financial status at the 2025-2026 Annual meeting (May 3, 2026).

The community support of the Harvest moon Fair and other fundraising throughout the year was extraordinary! Special thanks to Al Tosti and David Dreyfus for coordinating the treasury component for the Harvest Moon Fair as well to Annie Hewitt for coordination of the plate counting, especially on special Sundays with high attendance. We are seeking additional volunteers each week to help with the plate; please let us know if you are able to help.

A special thank you to Ebiere Omoregie, Office Manager, and Allison Sillers, Office Specialist--it has been a challenging year (Ebiere and Allison you are rockstars!). Thanks, as well, to Liz McKersie, Bookkeeper; Liz continues to go the extra mile to help maintain critical financial activities. When you next see Ebiere, Allison, or Liz please thank them for their efforts and dedication.

2026-2027 Priorities:

2025– 2026 Treasury activity continues to require appropriate financial oversight and control; your financial commitment is important, and we work to protect your gifts and respect your support.

Treasury and Finance worked closely together to prepare and carefully review the proposed 2026-2027 budget. This budget cycle is challenging, and we are working hard to position First Parish for success in the coming year. Stewardship remains critical for First Parish. We are grateful for continued congregational support despite adverse economic trends.

Looking ahead to the upcoming ministry search, we will partner with leadership, search committee members, and our ministers to plan supporting activities, carefully manage expenses, and position First Parish as an attractive congregation, for potential lead ministerial candidates.

If you have questions, please email: Treasurer@FirstParish.info

Sincerely,

Carolyn Hodges, Treasurer

Annie Hewitt, Assistant Treasurer

Treasurer: Carolyn Hodges

Assistant Treasurer: Annie Hewitt

First Parish Unitarian Universalist of Arlington

2025 -2026 Giving First Program (and special initiatives)

As of March 31, 2026

Giving First		
Jun/Jul/Aug	BAGLY- youth-led advocates for LGBTQ+ youth in Boston and beyond	\$1,774.00
September	SVPA- Social Venture Partners-philanthropy focused on supporting Boston-area nonprofit organizations	\$1,692.00
October	TRC- The Record Company, dedicated to providing affordable space for Boston's music community	\$1,078.50
November	Chaplains on the Way, building relationships with those experiencing homelessness in Waltham	\$2,413.50
December	The Welcome Project (Somerville) providing immigrant advocacy and empowerment	\$2,327.25
January	The Network/ LaRed working to ends LGBTQ+ domestic violence / partner abuse	\$2,090.00
February	Boston Healthcare for the Homeless	\$2,054.00
March	Boston Women's Fund advocates/ invests in women, girls and gender-expansive individuals leading grassroots justice initiatives	\$2,704.00
Special Initiatives		
December	UUA Renewal House (12/2025)	\$5,316.00
February	Reckoning & Repair Initiative (R&R)- UU Urban Ministry /Roxbury Youth Programs	\$27,000.00

FIRST PARISH UUA ARLINGTON SCORECARD TEMPLATE

Jun-25 Full year close as of 4 Aug 2025

	Current Month Actual	Current Month Budget	Variance	%var	YTD actual	YTD Budget	Variance (amt)	Variance (%)	Notes/ Drivers
Income									
Pledge	23,932	19,724	4,208	21.3%	778,473	787,000	(8,527)	-1.1%	YTD pledges rebounded, tracking more closely to plan. Prepaid pledges for 2025-2026 recorded on the balance sheet are \$68.7K to be reflected in July 2025 income.
Plate	3,383	2,904	479	16.5%	47,312	45,000	2,312	5.1%	YTD plate is favorable to budget
Fundraiser	0	0	0	0.0%	25,679	20,500	5,179	0.0%	Town Day and Harvest Moon Fair Fundraiser revenue above budget
Tenant*	4,933	4,900	33	0.7%	56,176	58,800	(2,624)	-4.5%	ACH rent is current. YTD paid includes 2024 inflation adjustment (\$800). Note: The 2023 inflation adjustment was waived by FP
Other Building	1,225	2,917	(1,692)	-58.0%	32,796	35,000	(2,204)	-6.3%	Other rentals slightly below budgeted trends, large payments received from Philharmonic and other user groups.
Other Revenue (parking/solar)	6,055	850	5,205	612.4%	11,279	10,200	1,079	10.6%	YTD Parking revenue fully paid, solar panel payment received throughout the year.
One Time Gifts	190	1,208	(1,018)	-84.3%	14,727	14,500	227	1.6%	One time gifts includes \$50.6K contribution for Minister Retirement reclassified to balance sheet (a/c 2100).
2nd Minister Fund	2,167	2,167	0	0.0%	25,999	26,000	(1)	0.0%	2nd Minister fund contribution
Other Income (int income/trustee funds)+	13,617	583	13,034	100.0%	92,893	89,780	3,113	3.5%	Trustee paid building and housing as budgeted. Interest income exceeds YTD budget
non-recurrent income (Surplus)					12,767	63,238	(50,471)	-79.8%	FP use of surplus \$12K vs budged amount of \$63K
Total (sum)	55,502	35,253	20,249	57.4%	1,098,101	1,150,018	(51,917)	-4.5%	

All Income	55,502	35,253	20,249	57.4%	1,098,101	1,150,018	(51,917)	-4.5%	Key Drivers- Favorable Fundraisers and Plate revenue, offset by unfavorable building rental and other revenue	
% explained	100.0%	100.0%			100.0%	100.0%				
Expense										
Salary*	52,784	49,076	(3,708)	-7.6%	591,013	588,907	(2,106)	-0.4%	Salary increases effective 7/1/24.	
Benefits (all)*	16,310	19,560	3,250	16.6%	181,385	219,059	37,674	17.2%	Benefits budget reflects budgeted cost not being used by eligible staff.	
Contractor, Office, Utilities & Insurance exp	6,536	6,333	(202)	-3.2%	69,526	76,000	6,474	8.5%	There is \$7K overage in computer hardware and software expense, offset by favorable variances in all other categories. Finance plans to work with the Office to view software contracts.	
Property- maint	16,674	5,023	(11,651)	-231.9%	60,280	60,280	(0)	0.0%	Property Committee expense includes \$7.4K of unspent funds rolled forward to 2025-2026	
Property - building	1,253	2,688	1,434	53.4%	46,532	51,750	5,218	10.1%		
General exp	(2,546)	2,125	4,671	219.8%	24,379	23,500	(879)	-3.7%	There is a \$1.4K overage in housekeeping and \$2.6K overage in coffee hour supplies expense that is offset by all other categories. The Office will work with Finance to review activity in these categories.	
Committees	12,131	4,792	(7,339)	-153.1%	54,969	58,510	3,541	6.1%	There is \$2K overage in music expense, reviewed by the Parish Committee.	
Outreach, special initiatives	3,929	1,946	(1,983)	-101.9%	70,017	72,262	2,245	3.1%	Giving First expenses exceeded budget, offset by added plate revenue.	
Total (sum)	107,069	91,543	(15,527)	-17.0%	1,098,102	1,150,268	52,166	4.5%		
All Expense	107,070	91,543	(15,527)	-17.0%	1,098,101	1,150,018	51,917	4.5%	Key Drivers- Favorable YTD variances in most expense categories.	
% explained	100.0%	100.0%			100.0%	100.0%				
net position	(51,567)	(56,290)	4,722		0	0	0			
		ck	4,722				0			

June 2025 Comments

YTD net position is favorable - Key drivers are favorable YTD expenses in most categories, offsetting unfavorable pledge revenue and building rental revenue

NOTE: Par Comm vote: the 2024-2025 Budget was increased \$10,764. due to a calculation error in the staff salary detail for the year (impacting salaries and professional expenses). This increase also impacted the approved amount targeted to balance the 2024-2025 budget - this amount is now \$63,238 (previously \$52,474)

Parcomm authorized 2024-2025 surplus loan of \$63,238 (adjusted for budget revision)- of which \$12,767 was used to cover net revenue shortfall for the year. Second Minister fund is in year 5, monthly income capture \$2,166.67 as planned, annualized as \$26,000.00

The Retained Earning reserve was reduced by Parish Committee authorized loan for 2024-2025 of \$12,267 (amount needed to balance 2024-2025).

Year end total of \$292,806 allocated as follows:

Contingency reserve for 2024-2025 of \$156,910 (2 months of Personnel, Property, Utilities and Insurance exp) and \$148,666 of discretionary surplus
Discretionary Surplus of \$144,140

First Parish received a generous gift of \$61,676 in June of 2024- the donor requests the funds are for Operating activity and to be spend within 2 to 3 year.

Remaining funds are \$58,676- see account details for further information.

2022 AIM security deposit recorded (account 2302) \$16,380.00. In Ma 2025, additional deposit pending \$4,789.00 (paid early June 2025)- total \$21,169.00

Planned Property Expenses	\$4,000.00	Arbor Care	trim maple
	\$2,000.00	Arbor Care	trim pears
	\$5,685.00	GF Sprague	Gutter/siding repair
		Francisco	
	\$1,200.00	Landscaping	trim Yews
Total	\$12,885.00		

Statement of Activity by Month

First Parish Unitarian Universalist of Arlington M

July, 2025-March, 2026

	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026	Mar 2026	Total
Income										
4100 Pledges										
4110 Current Year Pledges	110,666.54	46,256.65	33,709.89	67,191.82	105,410.85	105,018.57	72,313.10	46,899.72	69,977.97	657,445.11
Total for 4100 Pledges	110,666.54	46,256.65	33,709.89	67,191.82	105,410.85	105,018.57	72,313.10	46,899.72	69,977.97	\$657,445.11
4200 Plate Offerings	1,885.00	975.00	3,604.00	2,673.10	5,076.00	4,926.50	5,174.00	4,104.00	3,897.00	32,314.60
4300 Fundraisers										
4310 Fair					27,965.26	37.04				28,002.30
4330 Other Fundraisers	-125.00	78.51	4,435.53	640.00	-243.96	430.96	10.00		160.00	5,386.04
Total for 4300 Fundraisers	-125.00	78.51	4,435.53	640.00	27,721.30	468.00	10.00		160.00	\$33,388.34
4400 User Donations (Building Fees)										
4410 Lead Tenant Rent	4,378.69	3,750.00	5,138.63	4,509.94	4,509.94	12,019.88	5,878.69		141.19	40,326.96
4420 Other building (Rental) Use	380.00	1,208.00	850.00	1,675.00	7,260.00	4,582.50	6,425.00	7,865.00	3,868.00	34,113.50
Total for 4400 User Donations (Building Fees)	4,758.69	4,958.00	5,988.63	6,184.94	11,769.94	16,602.38	12,303.69	7,865.00	4,009.19	\$74,440.46
4500 Other Contributions										
4510 Parking revenue			1,500.00		1,000.00		500.00		500.00	3,500.00
4520b One-Time Gifts (other)					140.00	630.00	-615.90			154.10
4520 One-Time Gifts	1,175.10	1,175.10	1,475.10	6,595.10	5,695.10	-6,949.90	7,415.10	1,205.10	2,825.10	20,610.90
4525 Social Justice			726.07							726.07
Total for 4500 Other Contributions	1,175.10	1,175.10	3,701.17	6,595.10	6,835.10	-6,319.90	7,299.20	1,205.10	3,325.10	\$24,991.07
4600 Interest	863.62	830.79	731.89	703.89	656.99	730.78	659.74	608.06	686.44	6,472.20

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Statement of Activity by Month

First Parish Unitarian Universalist of Arlington M

July, 2025-March, 2026

	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026	Mar 2026	Total
4700 Trust Fund										
Contributions										
4720 Trust Fund	15,070.00	730.00		15,800.00			15,800.00			47,400.00
Contributions to Capital Expenses										
4730 Trust Fund-Wellington	5,625.00	1,375.00		7,000.00			7,000.00			21,000.00
Total for 4700 Trust Fund Contributions	20,695.00	2,105.00		22,800.00			22,800.00			\$68,400.00
Total for Income	139,918.95	56,379.05	52,171.11	106,788.85	157,470.18	121,426.33	120,559.73	60,681.88	82,055.70	\$897,451.78
Cost of Goods Sold										
Gross Profit	139,918.95	56,379.05	52,171.11	106,788.85	157,470.18	121,426.33	120,559.73	60,681.88	82,055.70	\$897,451.78
Expenses										
5100 Personnel										
5110 Salary	45,898.63	44,094.91	38,048.45	52,443.92	48,762.20	48,878.67	49,093.12	49,436.97	46,448.68	423,105.55
5120 FICA + PFML (EmployER)	1,467.63	1,717.85	1,655.21	1,978.62	1,596.90	1,761.40	1,622.37	1,645.71	1,650.73	15,096.42
5130 Workers Comp	979.25			1,705.25		832.25				3,516.75
5140 Pension (UUA)	2,863.41	3,639.38	3,831.62	3,895.70	3,895.70	3,895.70	3,895.70	3,895.71	3,905.18	33,718.10
5150 Health Insurance	5,744.44	5,002.58	5,002.58	5,002.58	5,002.58	5,002.58	6,652.71	6,620.22	6,620.22	50,650.49
5160 Life Insurance	173.70	241.70	241.70	241.70	241.70	241.70	241.70	374.84	241.70	2,240.44
5170 Disability Insurance	410.59	540.59	540.59	150.59	410.59	410.59	410.59	616.63	410.59	3,901.35
5190 Prof Expenses	156.67	2,726.47	3,830.40	2,772.05	2,087.90	2,207.66	3,160.29	2,494.58	1,733.67	21,169.69
5193 Recruitment expenses			15,407.63			27.47				15,435.10
FICA						0.00				0.00
Total for 5100 Personnel	57,694.32	57,963.48	68,558.18	68,190.41	61,997.57	63,258.02	65,076.48	65,084.66	61,010.77	\$568,833.89

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Statement of Activity by Month

First Parish Unitarian Universalist of Arlington M
July, 2025-March, 2026

	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026	Mar 2026	Total
5120 Personnel										
FICA (EmployER)					83.13	-83.13	0.00	0.00	0.00	0.00
Total for 5120 Personnel					83.13	-83.13	0.00	0.00	0.00	\$0.00
5200 Contractors & Consultants										
5220 contractors-Admin/Office						0.00				0.00
5240 Consultants (HR,Finance,Prof)	1,950.00	2,250.00	2,100.00	2,100.00	1,650.00	1,350.00	1,575.00	3,600.00	2,240.00	18,815.00
5250 Stipends/Honoraria							0.00			0.00
Total for 5200 Contractors & Consultants	1,950.00	2,250.00	2,100.00	2,100.00	1,650.00	1,350.00	1,575.00	3,600.00	2,240.00	\$18,815.00
5300 Office Expenses										
5340 Telephone & Internet	548.60		1,094.19	548.85	369.37	456.48	472.77	472.61	472.61	4,435.48
5341 IT Support (newly broken out of 5340)			135.00	1,462.50				1,011.00		2,608.50
5346 Administrative Support					50.00	-50.00				0.00
5350 Office Supplies & Repairs	37.63	25.60	414.25	308.02	120.73	467.68	56.85	807.83	287.84	2,526.43
5360 Office Equip Lease & Maintenance	219.95	165.55	646.67	430.46	607.59	396.94	383.36	565.29	648.51	4,064.32
5397 Computer software/hardware	1,547.93	1,215.10	1,564.38	1,532.33	2,464.77	1,435.41	1,955.99	1,359.09	2,569.96	15,644.96

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Statement of Activity by Month

First Parish Unitarian Universalist of Arlington M

July, 2025-March, 2026

	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026	Mar 2026	Total
5398 Computer Software - use #5397							106.24		-106.24	0.00
Total for 5300 Office Expenses	2,354.11	1,406.25	3,854.49	4,282.16	3,612.46	2,706.51	2,975.21	4,215.82	3,872.68	\$29,279.69
5400 General Church Expenses										
5405 Cleaning Services-Church					350.00	8,199.00	3,900.00	4,125.00	9,625.00	26,199.00
5406 Cleaning Services-Nursery School (Revenue offset)									-6,000.00	-6,000.00
5410 Housekeeping Supplies & Repairs	895.01		311.69	301.21	693.65	368.24	377.89	584.52	574.87	4,107.08
5415 Treasurer's Expenses	571.72	404.16	97.03	313.02	381.78	507.82	914.97	356.47	136.74	3,683.71
5420 Coffee/Friendship Hour Supplies		342.62	547.51	504.04	534.53	447.25	352.52	351.75	244.63	3,324.85
5430 Worship Supplies, etc.				473.50		687.21	119.35			1,280.06
5440 Stipends/Honoraria Guest Ministers							670.00			670.00
5445 Sign Language Interpreter							0.00			0.00
5460 Minister's Discretionary Fund									0.00	0.00
5470 Staff Development						50.00				50.00
5482 Auditor/Audit Reserve	166.67	166.67	166.67	361.67	361.67	1,531.67	-2,953.33	1,531.67	1,636.67	2,970.03

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Statement of Activity by Month

First Parish Unitarian Universalist of Arlington M
July, 2025-March, 2026

	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026	Mar 2026	Total
5483 Insurance	3,908.00			3,530.00		3,908.00				11,346.00
Total for 5400 General Church Expenses	5,541.40	913.45	1,122.90	5,483.44	2,321.63	15,699.19	3,381.40	6,949.41	6,217.91	\$47,630.73
5500 Property Expenses - Main Building		258.00	-258.00				0.00	309.00	-309.00	\$0.00
5510 Utilities										
5511 Heating Fuel Oil & Gas	54.50	57.32	45.30	60.97	89.24	1,489.80	2,761.15	2,882.57	2,939.81	10,380.66
5512 Water & Sewer	100.00	1,231.65		1,584.01	50.00		3,913.33			6,878.99
5513 Electricity		68.00	211.29	1,035.18		4,578.90		2,819.68	3,578.40	12,291.45
5514c Solar Power Purchase Agreement	1,566.25			1,746.82						3,313.07
Total for 5510 Utilities	1,720.75	1,356.97	256.59	4,426.98	139.24	6,068.70	6,674.48	5,702.25	6,518.21	\$32,864.17
5521 Elevator Inspection and Maintenance									5,536.68	5,536.68
5530 Main Building Maintenance (Infrastructure) & Repair	3,058.04	7,332.74	2,290.03	5,319.52	13,311.67	2,508.94	-5,540.53	3,999.19	6,852.65	39,132.25
5536 Other Property Expenses	258.00		-258.00	309.00	309.00	309.00	309.00		309.00	1,545.00
5545 Reserve for Sexton hrs/cleaning services				449.00		-449.00				0.00
5560 Snow Removal								1,500.00	7,625.00	9,125.00
Total for 5500 Property Expenses - Main Building	5,036.79	8,947.71	2,030.62	10,504.50	13,759.91	8,437.64	1,442.95	11,510.44	26,532.54	\$88,203.10

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Statement of Activity by Month

First Parish Unitarian Universalist of Arlington M

July, 2025-March, 2026

	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026	Mar 2026	Total
5600 Religious Education										
5610 Children/Youth		39.80	1,193.35	1,214.50	662.16	489.94	363.64	52.26	854.46	4,870.11
5615 CORI Checks	47.25			35.59		104.92	139.72	88.98		416.46
Total for 5600 Religious Education	47.25	39.80	1,193.35	1,250.09	662.16	594.86	503.36	141.24	854.46	\$5,286.57
5700 Music										
5750 Music Committee			550.00	250.00	15.00	4,674.99	276.50	459.99	909.07	7,135.55
5760 Piano Repair	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	1,125.00
5790 Organ Fund Set-aside	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	1,500.03
Total for 5700 Music	291.67	291.67	841.67	541.67	306.67	4,966.66	568.17	751.66	1,200.74	\$9,760.58
5800 Other Committees										
5807 Lay Ministry						158.92				158.92
5808b Leadership Development					235.58					235.58
5809 Membership Committee	0.00			137.60						137.60
5810 Parish Committee	1,701.16		243.29	42.21	322.67	2,384.41	53.22	-55.29	1,273.22	5,964.89
5812b Social Justice Committee	-250.00		132.95	447.59		307.67		47.99	123.32	809.52
5812 Racial Justice Committee				1,769.35	916.67	616.80	416.67	416.67	276.67	4,412.83
5815 Stewardship Committee				46.56		99.35	312.00	491.47	756.55	1,705.93
5816 Search Committee			756.84							756.84
5821 Gardening	0.00	52.30	150.00							202.30

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Statement of Activity by Month

First Parish Unitarian Universalist of Arlington M

July, 2025-March, 2026

	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026	Mar 2026	Total
5822 Art Committee				80.06				82.89		162.95
5899 Miscellaneous			0.00							0.00
5975 Welcoming Committee									529.72	529.72
Total for 5800 Other Committees	1,451.16	52.30	1,283.08	2,523.37	1,474.92	3,567.15	781.89	983.73	2,959.48	\$15,077.08
5900 Outreach										
5910 UUA			12,135.25		12,135.25		12,135.25			36,405.75
5940 Giving First	855.00	2,791.00	1,692.00	-1,280.00	2,413.50	2,327.25	2,090.00	2,052.00	2,704.00	15,644.75
Total for 5900 Outreach	855.00	2,791.00	13,827.25	-1,280.00	14,548.75	2,327.25	14,225.25	2,052.00	2,704.00	\$52,050.50
Reimbursements							0.00			0.00
Unapplied Cash Bill Payment Expense	0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Worship Supplies, etc.						0.00				0.00
Total for Expenses	75,221.70	74,655.66	94,811.54	93,595.64	100,417.20	102,824.15	90,529.71	95,288.96	107,592.58	\$834,937.14
Net Operating Income	64,697.25	-	-	13,193.21	57,052.98	18,602.18	30,030.02	-	-25,536.88	\$62,514.64
		18,276.61	42,640.43					34,607.08		
Other Income										
Other Expenses										
Net Other Income										
Net Income	64,697.25	-	-	13,193.21	57,052.98	18,602.18	30,030.02	-	-25,536.88	\$62,514.64
		18,276.61	42,640.43					34,607.08		

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Statement of Financial Position
 First Parish Unitarian Universalist of Arlington M
 As of Mar 31, 2026

	Total
Assets	
Current Assets	
Bank Accounts	
1-Church	\$0.00
1010 Treasurers Checking	70,062.86
1011 RE Checking	0.00
1012 Treasurers Money Market	0.00
1013 Cambridge Savings	54,772.09
1014 Leader Bank Savings	482,886.77
1021 Organ Reserve Passbook Savings	0.00
1023 Fair Savings	6,220.29
Total for 1-Church	\$613,942.01
2-Alliance	
1030 Alliance Operating	9,919.70
1031 Alliance Trustees	0.00
Total for 2-Alliance	\$9,919.70
3-Trustees	
1040 Trustee Checking	0.00
Total for 3-Trustees	\$0.00
Bill.com Money Out Clearing	45.00
Total for Bank Accounts	\$623,906.71
Accounts Receivable	
Accounts Receivable	0.00
Total for Accounts Receivable	\$0.00
Other Current Assets	
1130 Alliance Investments	537,658.94
1140 Trust Fund Investments	2,506,910.00
1150 Agnes Whitman Damon Wellington Fund	1,066,147.00
1200 Miscellaneous Assets	29,104.00
1205 Petty Cash	189.80
Payroll Corrections	0.00
QuickBooks Tax Holding Account	5,229.51
Total for Other Current Assets	\$4,145,239.25
Total for Current Assets	\$4,769,145.96

Statement of Financial Position
 First Parish Unitarian Universalist of Arlington M
 As of Mar 31, 2026

	Total
Fixed Assets	
1310 Church Property	4,170,100.00
1320 Organ & Pianos	618,090.00
1330 Equipment and Furnishings	50,000.00
1340 Misc Assets - Vault, etc.	27,870.00
Total for Fixed Assets	\$4,866,060.00
Total for Assets	\$9,635,205.96
Liabilities and Equity	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable (A/P)	0.00
Total for Accounts Payable	\$0.00
Credit Cards	
Chase Credit Card	3,273.07
Total for Credit Cards	\$3,273.07
Other Current Liabilities	
2100 Accounts Payable	0.00
2120 Payroll Tax Payable	4,660.92
2121 401K Employee Salary Reduction Contribution	-309,635.17
2122 401K Contributions	313,751.77
2123 Pre-Tax Health Insurance	-19,474.65
2300 Restricted-Designated Prps Funds	\$0.00
2301 Ferry Beach	1,851.28
2303 Instrument Tunings	0.00
2305 Renewal House	568.00
2306 Shinn Fund	0.00
2307 Social Justice	0.00
2308 R&R Fund	6,803.02
2311 Memorial Garden	11,117.91
2314 Founders Fund	0.00
2315 Racial Justice Committee	0.00
2316 Artwall	0.00
2321 Sound, Tapestry, Linen reserve	0.00
2322 Jewish Awareness	0.00
2333 Youth Group Coordinator Reserve	0.00

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Statement of Financial Position
 First Parish Unitarian Universalist of Arlington M
 As of Mar 31, 2026

	Total
2334 Ministerial Discretionary Fund	27,361.70
2335 Youth Group	2,604.03
2336 UUA-MBD friends	0.00
2337 Religious Ed Reserve	4,798.14
2338 Coffee table	0.00
2339 Second minister search fund reserve	0.00
2340 Remembrance Corner	1,876.18
2341 Giving First Fund	4,756.00
2342 Kitchen Registry	0.00
2343 BLUU	0.00
2344 Indigenous Justice Working Group	0.00
2345 Reparations and Repair	0.00
2350 Capital Projects Fund	0.00
2399 Misc Designated Funds	2,666.68
2400 Music Fund	51,139.03
2401 Sanctuary Fund	0.00
2402 Property Comm. Rollover	0.00
2403 STAR	0.00
2404 Living Tradition	0.00
2405 Sabbatical Reserve	67,353.60
2406 Auction reserve	0.00
2407 Transylvania Fund	0.00
2408 Tornado Relief	0.00
2409 funds freed up by Woburn Grant	0.00
2410 General Reserve Contingency Fund	285,806.11
2411 Property Maintenance Contingency Fund	0.00
2412 Meetinghouse Restricted Fund	0.00
2413 UUlations fund raiser	0.00
2414 Parish Committee Contingency Fund	0.00
2415 Donation for addit. minist. support	0.00
2416 Other Current Liabilities	57,686.78
Total for 2300 Restricted-Designated Prps Funds	\$526,388.46
2800 Restricted-Future Years	\$5,684.57
2801 Pledges for Future Year	24,849.82
2802 PPP Loan Reserve	0.00
2803 Prepaid housing allowance	0.00

3/5

Cash Basis Friday, April 17, 2026 04:37 PM GMT-04:00

Statement of Financial Position
 First Parish Unitarian Universalist of Arlington M
 As of Mar 31, 2026

	Total
Total for 2800 Restricted-Future Years	\$30,534.39
Direct Deposit Payable	0.00
Payroll Liabilities	
401(k) Employee Catch-up (+50)	0.00
HSA	0.00
MA-DOR Tax Levy	0.00
MA Paid Family And Medical Leave	0.00
UUA Dental Plan	0.00
UUA Retirement 401(k) Employer Contribution	0.00
Total for Payroll Liabilities	\$0.00
Total for Other Current Liabilities	\$546,225.72
Total for Current Liabilities	\$549,498.79
Long-term Liabilities	
2302 2302- AIM Security Deposit	21,169.00
2317 Second Minister Fund	3,525.20
Total for Long-term Liabilities	\$24,694.20
Total for Liabilities	\$574,192.99
Equity	
3100 Trust Funds Balances	
3101 Founders Fund	0.00
3102 Tobey Fund	42,328.00
3103 Maintenance Funds	34,953.00
3104 Social Investment Fund	6,324.00
3105 Agnes Whitman Damon Wellington Fund	1,066,147.00
3106 Minister's Housing	0.00
3107 Capital Infrastructure	0.00
3190 General Trust Funds	2,434,805.00
Total for 3100 Trust Funds Balances	\$3,584,557.00
3200 Alliance Funds	547,578.64
3900 Unrestricted Equity	
3910 Fixed Assets Equity	4,866,060.00
3920 Cash and Securities Unrestricted	0.00
Total for 3900 Unrestricted Equity	\$4,866,060.00
Opening Balance Equity	0.00
Retained Earnings	302.69

4/5

Cash Basis Friday, April 17, 2026 04:37 PM GMT-04:00

Statement of Financial Position

First Parish Unitarian Universalist of Arlington M

As of Mar 31, 2026

	Total
Net Income	62,514.64
Total for Equity	\$9,061,012.97
Total for Liabilities and Equity	\$9,635,205.96

**FIRST PARISH UNITARIAN UNIVERSALIST OF ARLINGTON, MA
BUDGET FOR FY27 approved by ParCom 04-21-26**

acct #		FY 25 Actual	FY 26 Budget	subtotals	FY27 budget	subtotals	\$ diff to previous budget
EXPENSES							
5100	Personnel - Total	\$772,398		\$804,416		\$790,473	-\$13,943
	Office Expenses - Total			\$56,000		\$60,817	\$4,817
5340	Telephone & Internet	\$5,655	\$6,400		\$5,122		
5341	IT Support (newly broken out of 5340)	\$2,315	\$6,100		\$3,195		
5350	Supplies/Repairs/Printing	\$3,768	\$6,000		\$6,000		
5360	Office Equip Lease & Maintenance	\$6,542	\$9,000		\$9,000		
5397	Computer Software/Hardware	\$19,095	\$16,000		\$16,000		
5415	Treasury Costs cc processing	\$5,542	\$6,500		\$5,500		
	Transition Committee		\$6,000		\$3,000		
	settled minister search expenses	0			\$13,000		
	Contractors & Consultants - Total			\$12,500		\$22,000	\$9,500
5240	Consultants (bookkeeping)	\$19,893	\$12,500		\$22,000		
	General Expenses - Total			\$38,300		\$61,300	\$23,000
5410	Cleaning & Supplies (Housekeeping)	\$6,380	\$6,000		\$2,000		
	Cleaning services				\$33,000		
5420	Coffee/Friendship Hour Supplies	\$6,612	\$5,500		\$4,800		
5430	Worship Supplies, Etc.	\$1,445	\$2,000		\$2,000		
5440	Stipends/Honoraria for Guest Speakers	\$2,400	\$2,800		\$2,000		
5482	Auditor/Audit Reserve	\$2,000	\$2,000		\$1,500		
5580	Insurance	\$12,257	\$20,000		\$16,000		
	Property - Total			\$110,250		\$111,525	\$1,275
5511	Utilities: Gas Heat	\$12,476	\$12,800		\$13,000		
5512	Utilities: Water & Sewer	\$4,890	\$5,000		\$5,000		
5513	Utilities: Electricity	\$13,125	\$9,000		\$13,000		
5514B	PowerOptions Membership	\$266	\$250		\$275		
5514C	Solar Power Purchase Agreement	\$5,004	\$5,000		\$5,000		
5520	Heating Maintenance & Repair		\$5,000		\$2,000		
5521	Elevator Maintenance & Inspection	\$5,189	\$5,500		\$5,550		
5530	Infrastructure Maintenance and Capital Exp.	\$60,280	\$63,200		\$63,200		
5560	Snow Removal	\$5,582	\$4,500		\$4,500		
	<i>New boiler expense is not reflected in the operating budget</i>						
	Religious Education - Total			\$12,975		\$9,575	-\$3,400
5610	Children & Youth	\$7,658	\$9,175		\$9,175		
5630	Youth Group Trip Coordinator Fund	\$1,500	\$1,500				

561b	LUKI checks	\$625	\$2,300	\$400		
	Music - Total			\$22,000	\$20,000	-\$2,000
5750	Music Committee	\$20,542	\$18,500	\$16,500		
5760	Piano Repair	\$1,500	\$1,500	\$1,500		
5790	Organ Fund set-aside	\$2,002	\$2,000	\$2,000		
	Other Committees - Total			\$27,650	\$21,800	-\$5,850
5801b	STAR/Adult RE	\$435	\$500	\$500		
5807	Lay Ministry	\$161	\$150	\$150		
5808b	Leadership Development	\$508	\$700	\$600		
5809	Membership	\$515	\$1,200	\$1,200		
5810	Parish Committee Discretionary Fund	\$9,098	\$9,500	\$9,000		
5812a	Racial Justice Coordinating Committee	\$3,000	\$8,000	\$3,000		
5812b	Social Justice committee (umbrella)	\$3,206	\$3,000	\$3,000		
5815	Stewardship	\$2,708	\$3,000	\$3,000		
5821	Gardening	\$507	\$250	\$250		
new	Art Committee		\$350	\$350		
5975	LGBTQ+ Affirming	\$1,004	\$1,000	\$750		
			279,675	307,017		\$27,342
	Dues/Memberships/Outreach		69,132	73,541		\$4,409
5910	UUA	\$44,129	\$44,132	\$48,541		
5975b	UU Mass Action membership	\$2,500	\$2,500	\$2,500		
5940	Giving First (=1/2 of plate offerings)	\$23,388	\$22,500	\$22,500		
	total expenses		1,153,22	1,171,031		\$17,808

INCOME		Actual last year	Budget FY27	
4110	Total Pledges	\$778,473	\$794,000	\$800,000
4200	Plate Offerings (including Giving First)	\$47,312	\$45,000	\$45,000
4720	Trustees' contribution - capital reserve fund	\$60,280	\$63,200	\$66,240
4730	Agnes Whitman Damon Wellington Fund	\$22,500	\$28,000	\$29,240
4525	Social Justice - Pie Palace income		\$3,000	\$3,000
4310	Volunteer Fundraising (inc. HMF)	\$20,066	\$16,000	\$20,000
4410	User Donations/Rental Fees: R.E. wing	\$56,176	\$60,270	\$62,000
4420	User Donations/Rental Fees: All Others	\$32,796	\$35,000	\$37,500
4510	Parking spaces	\$6,000	\$6,000	\$6,000
4511	Solar Income	\$5,279	\$4,200	\$5,000
4520	One-time Gifts (second minister fund)	\$40,613	\$14,000	\$0
4520b	One-time gifts (other)	\$113	\$10,000	\$10,000
4600	Interest on NOW Acct		\$7,000	\$8,500
4540	retained earnings (surplus) from 2020-21	\$12,767	\$67,203	\$77,051
	Total Income		1,154,37	1,171,031
	balance			\$0

Appendix I: Minutes from First Parish's Annual Meeting, May 18, 2025

(Format: In person voting; Zoom Livestream)

The moderator, David Whitford, called the meeting to order at 12:35 PM.

The clerk, Joanna Pushee, observed there was a quorum. 116 members were present which is more than the 89 needed for quorum.

[443 total members; 89 members needed for quorum.]

This meeting was held in person with only in person members voting. There was a Zoom livestream where people could watch and hear the meeting but not vote.

The moderator recognized John Hodges, acting as the Parliamentarian, our advisor on all matters Robert's Rules of Order.

The meeting was recorded for the purpose of accuracy. The recording is not to be publicly distributed.

The moderator recognized Rev. Erica Richmond. Rev. Erica provided an invocation at 12:37 PM.

The moderator presented special rules for presenters invited by the Parish Committee. A two-thirds majority was needed to agree to the special rules.

- Presenters recognized by the Moderator were limited to four minutes including a main motion, if any.
- Speakers in debate of motions were limited to 1 minute each.
- The Parish Committee chair requested written ballots for one motion regarding the *emerita* minister status (Article V in the warrant).
- The Parish Committee had asked that no First Parish staff be in the room during the *emertia* minister article discussion.

So moved (Carolyn Hodges). Seconded (Lois) Unanimous consent by voice vote. No opposition.

The moderator declared that the motion passed.

1

The moderator introduced Lead Minister Rev. Marta Flanagan and Parish Minister Rev. Erica. The Parish Committee chair was Anne Quaadgras. To manage the Zoom livestream volunteers included MaryBeth Landy as Zoom host, Carolyn White as camera operator, and John Anderson as slide deck ruler. Counters and runners were named as Marie Meter and

Annie Hewitt. The clerk, Joanna Pushee, was introduced.

The moderator acknowledged the passing of First Parish members:

David Landskov, Barbara McCauley, Diane Barry, Louise Strayhoron, Janet Blodget, and the daughter of current FP member Amy Hadley, Rosie Hadley-Walker.

The moderator recognized the chair of the Parish Committee, Anne Quaadgras, at 12:44 pm. Anne provided a welcome message, gave an overview of the transitions in the congregation, and then explained the timekeeping technology.

- Highlights from the Parish Committee chair, Anne Quaadgras included:**
- General thanks to volunteers and the congregation which is volunteer-led
 - Set the stage to elect our leaders, adopt a budget for the program year, and present the vote on minister emerita to the congregation
 - Set the tone for a time of grieving the loss of Rev. Marta Flanagan as she retires and several staff transitions
 - The congregation will have said goodbye to Rev. Marta Flanagan, Rose Sawyer-Marsh in the Religious Education program, Rev. Tricia Brenan as adjunct minister covering for Rev. Erica Richmond's parental leave.
 - Welcome to Bella Jaffey. They are planning to return in the fall. Welcome to Allison Sillers, coming back in the fall as office associate. Welcome back Rev. Erica Richmond
 - The Parish Committee extended Rev. Erica's contract for the interim period.
 - First Parish will be welcoming an interim minister and the Interim Search Committee has been working hard. Any questions, ask a Parish Committee member.
 - Made a call to have more volunteers, especially on committees such as the Leadership Development Committee and the Stewardship Committee.
 - The timekeeping technology helps run the meeting smoothly. For each presenter, including those presenting the budget, the electronic timer helps manage the presentations and discussions. Rev. Erica will hold up color cards as well to signal to the speakers time remaining.

There was applause.

ARTICLE I: RECEIVE THE REPORTS

2

The Moderator announced that the minutes from the 2024 Annual Meeting were located in the Annual Report on pages 80 through 91. The Moderator explained to the people watching on Zoom to look at the slides with QR codes to access the Annual Report electronically.

The Moderator asked for a motion to receive the minutes of last year's Annual Meeting.

MOTION 2: “I move to receive the minutes of last year’s Annual Meeting.” (Tom Estabrook) Carolyn Hodges (Seconded). Affirmative consent. No opposition.

For this voice vote, the Moderator noted hearing no dissenting discussion and believing we were in favor, he declared passage of the motion by unanimous consent.

12:54

Article III: Annual Report 2024

The Moderator asked for a motion to receive the reports of the Annual Report, noting that the financial report was separate.

MOTION 3: I move to receive the reports of the Annual Report. (Alan Schweitzer) Seconded. (Marie Meter).

The Moderator declared passage of the motion by unanimous consent and declared the article disposed of.

The Moderator recognized the clerk, Joanna Pushee. Joanna read the names of 22 new members and welcomed them to First Parish. *There were 24 new members in total for 2024 - 2025 with one person joining the week before Annual Meeting (Peter Miller) who was welcomed by Rev. Tricia Brenan into the congregation, and one other member who wished to remain anonymous.*

Dorothy Anger
Matthew Bellantoni
Julia Dudley-Kramer
Chris Helal
Melissa Hower
Jay Leslie
Merlina McGovern
Anna Richardson
Megan Rising
Paul Sloboda

3
Amy Stubblefield
Debra Wood Bellantoni
Larry Berger
Marina Erulkar

Kassandra (Kassie) Howard
Erica LeBow
Bodi Luse
Hayley Powers
Julie Richardson
Megan Shand
Stacey Sloboda
Alex Wang

The moderator recognized Kiki Giatis, chair of the Leadership Development Committee. Kiki presented two votes: the officers and the standing committee leaders. The First Parish bylaws require a written ballot for the officers. Brief biographies of each nominee were noted on the slides.

Kiki Giatis announced the candidates for the officer positions: Annie Hewitt for the assistant treasurer and Joanna Pushee for the clerk position. For the Parish Committee, there were two open seats and the candidates were Marie Meter and Amy Speare. There were no contested seats.

There were no nominations from the floor for the officer positions or Parish Committee members.

The Moderator and Kiki Giatis provided instructions on filling out the paper ballot and noted that the runners would be helping the congregation get their ballots to the back of the sanctuary for counting by the counters. If anyone needed a ballot, they were instructed to raise their hand.

A First Parish member made a point of information about checking the “elect this slate in its entirety.”

Another First Parish member, Mark Wilke, made a point of information and asked if members were allowed to nominate themselves for a standing committee.

The Moderator instructed the congregation in the affirmative that members could nominate themselves from the floor for the standing committees.

Mark Wilke nominated himself for the Property Committee. Seconded by Carolyn Hodges. The nomination was accepted and Mark Wilke’s name was added to the ballot as a write-in candidate.

4

A First Parish member, PJ Gardner, made a point of information and asked if members could vote for all since no one is running against anyone else.

The Moderator answered in the affirmative and recognized John Hodges, acting as parliamentarian.

John Hodges, acting as parliamentarian, noted that the congregation had a written ballot for the standing committees before them. There is an opportunity to vote on it in its entirety. The standing committees have no definitive sizes. Mark Wilke, being nominated from the floor for the vote and seconded is now valid. Members need to write in Mark Wilke's name with a separate check mark on the ballot.

MOTION 4: "I move that we elect the slate of standing committees in its entirety." Tom Estabrook. Seconded by Carolyn Hodges.

MOTION 5: "I move that we elect Mark Wilke to the Property Committee." Tom Estabrook. Seconded by Carolyn Hodges.

Both motions 4 and 5 were done by voice vote and the congregation answered in the affirmative. There was no opposition.

1:08 PM - **Kiki Giatis was recognized by the Moderator.**

As the chair of the Leadership Development Committee (LDC), Kiki thanked individual volunteers by name. These volunteers stepped down from their respective committee roles.

- Julius Pereli
- Sharon Lenard, the Alliance
- Marie Meter, the Trustees; the Leadership Development Committee - Amy Speare, Stewardship Committee
- Alan Linov, Social Justice Committee
- Ellen Leigh, Social Justice Committee
- Ellen Robie, Religious Education Committee; special thank you for 9 years of service - Anthony Fernandez, Religious Education Committee; special thank you for about five years of service on the committee.
- Gail Page, Membership Committee
- Steve McMullin for his one-year term on the Parish Committee. He was filling in and completing a three-year term of a former ParCom member.
- Anne Quaadgras for her service of six years on the Parish Committee ---

5
The Moderator, David Whitford, gave thanks to the Reckoning & Repair Working Group and to the Interim Search Committee. There were oral reports from representatives from these two groups.

The Moderator recognized Maggie Carey, chair of the Reckoning & Repair Working Group.

4 minutes - Maggie Carey

Maggie provided an overview and reminder about the congregation voting during last year's annual meeting on the Reckoning & Repair Affirmation which acknowledged the truth about the founding members of First Parish. They were wealthy enough to purchase pews, and over half of these families were enslavers. The Reckoning & Repair Working Group has offered educational opportunities such as film screenings to the congregation in hopes that the next step, reparations, could begin. Reckoning and Repair met with the Parish Committee Executive and the Trustees. For the 2025 - 2026 program year, the Reckoning and Repair group has hopes that the congregation will support a reparations fund.

The Reckoning & Repair group has laid out criteria for selecting a partner organization with meaningful impact on its programming. The group feels the need to assess the congregation's own commitment to the goal of reparations. The group is willing to listen to feedback.

The Reckoning & Repair Working Group scheduled a fundraiser for Saturday, October 18, 2025. *APPLAUSE.*

The Moderator thanked Maggie Carey and asked if there was a motion to receive the report.

MOTION 6: "I move that we receive the report from the Reckoning & Repair Working Group." Tom Estabrook. Seconded by Lois Fine. There was unanimous consent by voice vote.

1:20 PM - **Interim Minister Search Committee (ISC)**

The Moderator recognized Marie Meteer of the Interim Search Committee (ISC)

First Parish member John Anderson made a point of information to name the other members of the ISC.

Marie Meteer serves as chair on the ISC with Lori Kenshaft, Jim Ptacek, and Marilyn Downs. Marie provided an overview of what the Interim Search Committee, which was appointed by the Parish Committee, does.

ISC is looking for what First Parish wants in an interim minister. ISC is looking at what the Unitarian Universalist Association guidelines are. The group gets to show who we are as a congregation. Marie let the congregation know the ISC created the profile and submitted it. The group will receive a set of people who are interested in First Parish.

6

Anne Quaadgras brought up a stand with a poster of the ISC timeline as a prop.

Marie Meteer spoke to the process and the timeline on having an interim minister come and help the congregation through the discernment process during the transition time. The ISC handles the matching and rounds. Marie acknowledged that the congregation's sadness in closing a chapter, but we are very happy that we are opening a new chapter.

Marie thanked the Parish Committee for choosing ISC members who represent different parts of the congregation and who are so dedicated.

APPLAUSE.

MOTION 7: I move to receive the report from the Interim Search Committee. Carolyn Hodges. Seconded by Anne Q. The motion passed unanimously by voice vote.

1:24 PM

The Moderator recognized the clerk, Joanna Pushee.
Joanna declared the results of the officers and the Parish Committee.

Annie Hewitt (Assistant Treasurer) 114 in favor, none opposed
Joanna Pushee (Clerk) 116 in favor, none opposed
Marie Meteer (Parish Committee) 115 in favor, none opposed
Amy Speare (Parish Committee) 114 in favor, none opposed

The Moderator declared Article III disposed of.

Overview of Financial Reports

The Moderator recognized Carolyn Hodges, the First Parish Treasurer, at 1:27 PM.

Treasurer, Carolyn Hodges, provided an overview of the financial reports starting on page 68 in the Annual Report. The profit and loss information is on pages 70 - 71.

Highlights of Carolyn's oral report for Fiscal Year 2023 - 2024 included:

- Expenses predominately fell below the budget.
- First Parish was able to offset its anticipated obligations.
- Thank you all for your support.

Highlights or FY 2025-26 forecast:

- Expenses are tracking below budget.
- Our revenue is remaining strong.
- To date, we remain ahead of plan and expect to use some funds from surplus, but that

will be less than planned. That amount is forecasted to be about \$4,000.

7

The Treasurer remarked on the generosity and kindness of the First Parish community. Pledges remain strong. First Parish supports its youth. The congregation provided financial support to hurricane relief. We supported our staff and lived by our values in doing so. First Parish engaged in a “good goodbye” for its lead minister. There have been one-time financial gifts. Those members before us have provided gifts and each one matters. Each gift supports our thriving community.

The Moderator asked if there was a motion to receive the financial reports.

MOTION 8: I move that we receive the financial reports. Tom Estabrook. Seconded by Anne Quaadgras. There was unanimous consent.

There was applause.

The Moderator recognized Anne Quaadgras, Parish Committee chair.

The Parish Committee chair described the budget process at First Parish.

Highlights included:

- The proposed budget is developed by the Finance Committee and the Parish Committee.
- The proposed budget has been approved by the Parish Committee. It is a balanced budget.
- There were three Listening Sessions provided.
 - No one attended the first session, but people came to the second and third sessions.

Finance Committee chair Lissa McBurney was recognized to speak about the proposed budget at 1:32 pm.

- Lissa noted she was pleased that Steve Pillemar would be joining her on the Finance Committee next year.
- Lissa noted the remarkable commitment of lay leaders and the joy of a balanced budget.
- The proposed budget shows that 71% goes to personnel.
- The total proposed budget is \$1,154,373.
- 68% of the proposed budget shows a revenue source from pledges and the rest comes from the endowment and rental income.
- The Second Minister Fund is in its 6th and final year. It is exciting to think back seven years ago to the planning stages.
- Lissa underlined what Carolyn had said about the previous year’s surplus. We anticipate offsetting as much of the surplus as possible (the 5% of the total).

Lissa touched on the personnel aspect of the proposed budget.

- The cost of benefits is going up: there is a 2.5% cost of living increase suggested by Unitarian Universalist Association (UUA) guidelines.
- First Parish was able to increase the portion of family health insurance starting on January 1, 2025, so that is continuing 2026.

8

- First Parish budgeted sexton use has been aligned for actual use.
- The Interim minister is budgeted per UUA guidelines.

Lissa indicated she would be happy to take questions. There were no questions.

1:36 PM - The Moderator thanked Lissa and the Finance Committee and asked if there was a motion to approve the proposed budget and authorize expenditures.

MOTION 9: I move we make such appropriations as are recommended by the Parish Committee in a proposed budget for the fiscal year 2025-2026 and authorize expenditures under the control and direction of the Parish Committee, in accordance with the budget adopted. (Tom Estabrook) Seconded by Anne Quaadgras. Unanimous consent by voice vote. No opposition.

Hearing no opposition, the Moderator declared the proposed budget accepted as submitted and the article disposed of.

APPLAUSE 1:36PM

The Moderator recognized Anne Quaadgras as Parish Committee chair for the next agenda item, **Article IV: appoint delegates to the General Assembly.**

Anne explained that the following motion is one that we adopt every year. Its purpose is to enable our congregation to participate in events and serve as delegates in General Assembly.

MOTION 10: To see if the members will authorize the Parish Committee to appoint lay and ministerial delegates to represent First Parish at meetings of the Unitarian Universalist Association and any other organizations requiring representation of the church. (Anne Q.) Seconded (Tom Estabrook). There was unanimous consent by voice vote.

The moderator declared article VI disposed of.

ARTICLE V: Minister *Emerita* status for Rev. Marta Flanagan

The moderator introduced Article V and indicated that it was time for ministers and staff to leave the sanctuary in compliance with the Parish Committee's recommendation. Rev. Marta Flanagan and Rev. Erica Richmond left the sanctuary.

A First Parish member had a point of order. Bonnie Zimmer asked if congregants could recycle the pieces of paper from the standing committee vote. The Moderator indicated that since the vote was unanimous, the paper ballots for the standing committees could be disposed of in the proper recycling receptacles.

The Moderator recognized Anne Quaadgras to speak about the minister *emerita* status.

9

- This resolution is for the congregation to confer minister *emerita* status onto Rev. Marta Flanagan.
- The last time First Parish granted this minister *emertius* honor was in 1990 for Rev. Charles W. Grady.
- The minister *emerita* demonstrates long and meritorious service to First Parish UU Arlington, and we are the only ones who can bestow this honor on Rev. Marta Flanagan per the UUA guidelines.
- It is a lifetime honor.
- The process involved reviewing the UUA guidelines, adding the language to the warrant article, and drafting and presenting a resolution to the Parish Committee. The Parish Committee voted to unanimously approve the addition of the article to the warrant and to add the resolution explaining what the minister *emerita* status means.

Parish Committee chair Anne Quaadgras noted that this was her final act as ParCom chair. She noted that Rev. Marta Flanagan has served with distinction. Anne read the warrant article and resolution as follows:

Article V: To see if the members will confer the title *Minister Emerita* on the Reverend Marta Flanagan, per the Resolution Conferring Emerita Status, as recommended unanimously by the Parish Committee.

RESOLUTION CONFERRING EMERITA STATUS ON THE REVEREND MARTA FLANAGAN

WHEREAS, Rev. Marta Flanagan has served with distinction as the Lead Minister of First Parish Unitarian Universalist Arlington from 2009 to 2025; and during her tenure, she has led the congregation through significant growth and stability, instilled a sense of what it means to be in religious community, provided numerous examples of fostering Beloved Community, and established structures and systems which have led to great strength in lay leadership as well as increased social justice advocacy. Rev. Marta Flanagan has demonstrated unwavering commitment to the mission and values of Unitarian Universalism, spiritual depth, and fostering a culture of turning outward; and her leadership has had a profound and lasting impact on the congregation, including current and former members, lay leaders, and staff members;

NOW, THEREFORE, BE IT RESOLVED, that the voting members of First Parish UU

Arlington do hereby confer upon the Reverend Marta Flanagan the title of ***Minister Emerita***, with all the rights, honors, and privileges thereto pertaining, as a testament to our deep appreciation for her exemplary devotion, skill, grace, integrity, and vision.

Anne Quaadgras made the following motion:

MOTION 11: I move that the members confer the title *Minister Emerita* on the Reverend Marta Flanagan, per the Resolution Conferring Emerita Status, as recommended unanimously by the

10

Parish Committee, as a testament for our deep appreciation. (Anne Q.) Seconded (Rev. Wendy Page / Carolyn Hodges).

1:45 PM - The Moderator opened discussion. David reminded members to limit their remarks to one minute. Loren Gomez assisted with bringing the microphone to members.

- A Parish Committee member, John Anderson, asked if the emerita minister status would allow Rev. Marta to be a voting delegate at the General Assembly.

Yes, the emerita minister status would allow this, and it would include having Rev. Marta's name on First Parish letterhead, the website, and in the workings booklet.

There is no financial obligation

- First Parish member Lisa H. Davis shared remarks in support of the motion. ○ She had the good fortune to be involved in the process of the minister search that resulting in calling Rev. Marta Flanagan.
 - She remarked on how saying goodbye is not easy.
 - How lucky we are as a congregation!

APPLAUSE

- First Parish member Lida Junghans in support of the motion.
 - The fact that Rev. Marta was attracted to First Parish was a testament to the search committee that brought her to us. Rev. Marta saw our "good bones" and was the shepherd we needed.
 - Rev. Marta taught the congregation the verb "to companion" and she embodied it. ○ Rev. Marta had the skill and organizational development to dive in profoundly.

APPLAUSE.

A First Parish member, Cathy Modica, asked a procedural question regarding the background and UUA materials, noting that UUA guidelines, as posted on the UUA website, mentioned some specific recommendations such as having a number of opportunities for listening sessions. Was there any conversation about these recommendations? Cathy did not recall opportunities for Listening Sessions on the emerita status.

The Moderator recognized Anne Quaadgras to answer the question posed at 1:51 PM.

Anne Quaadgras explained that as part of the Financial Committee's meetings, the Parish Committee held three listening sessions. The Parish Committee took questions about the emerita status during two of those sessions. The Parish Committee also drafted and created a policy which it then voted on and unanimously approved on April 15, 2025.

Anne read the policy aloud:

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Policy & procedure for awarding Minister Emerita/us

Policy: *The title Minister Emeritus or Minister Emerita may be granted to honor ministers who have served for a minimum of 10 years, with devotion, skill, grace, integrity, and vision. Qualified candidates must be in good standing with the UUA and UUMA, and fully retired from active service to First Parish by the end of the program year in which the title is granted. Candidates may be nominated by the current Parish Committee, or by a petition as per the First Parish Bylaws.*

Procedure: *There will be at least 2 opportunities for comment by voting members (e.g., listening session, cottage meeting) at least 1 week before a congregational vote.*

Approved by the Parish Committee on April 15, 2025

The Moderator asked if anyone wished to speak in opposition to conferring emerita status on the lead minister. There being no one, the Moderator indicated the congregants continue to speak.

- First Parish member Rachael Stark spoke in favor of the emerita status motion at 1:52 pm.
 - She indicated her main comment was a small thing: in Latin, a gendered language, the proper term is “minister emerita” for a woman. We are giving her the right title.
 - She spoke in favor and said let us stand up.

At 1:53 PM, John Anderson called the question. This action was seconded by Carolyn Hodges and Jennifer Kobayashi.

With the Moderator's prompting that we have the aforementioned motion on the table, the congregation voted by voice in the affirmative. There was no opposition.

I move that the members confer the title *Minister Emerita* on the Reverend Marta Flanagan, per the Resolution Conferring Emerita Status, as recommended unanimously by the Parish Committee, as a testament for our deep appreciation.

The runners collected the paper ballot and brought it to the counters, Marie Meter and Annie Hewitt, at the back of the sanctuary.

Rev. Marta Flanagan - Retirement Gift (Jeff Keffer)

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The Moderator recognized Jeff Keffer at 1:56 PM.

Jeff Keffer, Parish Committee member, spoke about the gratitude the congregation has shown Rev. Marta, highlighting the "Good Goodbye" party. One other aspect is the retirement gift. • Jeff gave oral instructions on mailing a check or giving to the retirement give via Realm.

First Parish member John Anderson made a point of information and reminded folks to write "Marta Gift" on any checks. In Realm, you can choose the drop down menu. In the "to" part of a check, write out to "First Parish UU Arlington"

Jeff concluded his presentation at 1:58 pm.

APPLAUSE.

The Moderator recognized Joanna Pushee, clerk, to announce the results of the minister *emerita* status.

Joanna reported the results of the minister *emerita* status:

There were 115 "yes" votes and 1 abstention.

The Moderator declared the article disposed of with the vote passing.

The Moderator recognized Tina Silberman at 2:00 pm. Tina invited Rev. Marta Flanagan to return and re-enter the sanctuary.

Rev. Erica was invited to re-enter the sanctuary.

At 2:01 PM, Rev. Marta Flanagan returned to the sanctuary to applause.

Rev. Marta noted how honored she was and how when she first arrived at First Parish, the congregation was nursing deep wounds. She expressed her gratitude and

stated how this Annual Meeting attests the financial health at a time in the world when congregations are not doing well. She noted how she loves the intimacy within the congregation and how that was her dream of religious community.

To a background of children playing outside and crying out in joy from the courtyard, Rev. Marta noted that she was honored that the congregation chose to designate her minister *emerita*. It is a sign of a relationship of the heart.

2:06 The Moderator declared Article IV disposed of.

The Moderator asked if there was a motion to adjourn the meeting.

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MOTION 12: I move that we adjourn the meeting. (Jeff Keffer) Seconded by Tom Estabrook. The meeting adjourned at 2:06 PM.

Benediction.

MOTIONS:

MOTION 1: The moderator presented special rules for presenters invited by the Parish Committee. A two-thirds majority was needed to agree to the special rules.

- Presenters recognized by the Moderator were limited to four minutes including a main motion, if any.
- Speakers in debate of motions were limited to 1 minute each.
- The Parish Committee chair requested written ballots for one motion regarding the *emerita* minister status (Article V in the warrant).
- The Parish Committee had asked that no First Parish staff be in the room during the *emerita* minister article discussion.

So moved (Carolyn Hodges). Seconded (Lois) Unanimous consent by voice vote. No opposition.

The moderator declared that the motion passed.

MOTION 2: "I move to receive the minutes of last year's Annual Meeting." (Tom Estabrook) Carolyn Hodges (Seconded). Affirmative consent. No opposition.

For this voice vote, the Moderator noted hearing no dissenting discussion and believing we are in favor, he declared passage of the motion by unanimous consent.

MOTION 3: I move to receive the reports of the Annual Report. (Alan Schweitzer) Seconded. (Marie Meteer).

MOTION 4: “I move that we elect the slate of standing committees in its entirety.” Tom Estabrook. Seconded by Carolyn Hodges. Unanimous consent by voice vote. No opposition.

The clerk read the results for the officers and Parish Committee members: 14
Annie Hewitt (Assistant Treasurer) 114 in favor, none opposed
Joanna Pushee (Clerk) 116 in favor, none opposed
Marie Meteer (Parish Committee) 115 in favor, none opposed
Amy Speare (Parish Committee) 114 in favor, none opposed

MOTION 5: “I move that we elect Mark Wilke to the Property Committee.” Tom Estabrook. Seconded by Carolyn Hodges. Unanimous consent by voice vote. No opposition.

MOTION 6: “I move that we receive the report from the Reckoning & Repair Working Group.” Tom Estabrook. Seconded by Lois Fine. There was unanimous consent by voice vote.

MOTION 7: I move to receive the report from the Interim Search Committee. Carolyn Hodges. Seconded by Anne Q. The motion passed unanimously by voice vote.

MOTION 8: I move that we receive the financial reports. Tom Estabrook. Seconded by Anne Quaadgras. There was unanimous consent.

MOTION 9: To see if the members will make such appropriations as are recommended by the Parish Committee in a proposed budget for the fiscal year 2025-2026 and authorize expenditures under the control and direction of the Parish Committee, in accordance with the budget adopted. (Tom Estabrook) Seconded by Anne Quaadgras. There was unanimous consent by voice vote.

MOTION 11: I move to confer the title *Minister Emerita* on the Reverend Marta Flanagan, per the Resolution Conferring *Emerita* Status, as recommended unanimously by the Parish Committee, as a testament for our deep appreciation. (Anne Q.) Seconded (Rev. Wendy Page / Carolyn Hodges).

The clerk, Joanna Pushee, read the results for the Minister *Emerita* vote: There were 115 “yes” votes and 1 abstention.

MOTION 12: I move to adjourn the meeting. (Jeff Keffer) Seconded by Tom Estabrook. Unanimous consent by voice vote.

Minutes prepared by clerk, Joanna Pushee, on May 18, 2025 and edited for clarity on March 23 & April 2, 2026. Submitted for approval to the congregation on May 3, 2026 at the annual meeting.