



UU CHURCH OF MARBLEHEAD

ANNUAL REPORT

2015 - 2016

Annual Report of the 2015/2016 Church Year prepared on behalf of the Board of Trustees for the UUCM Congregational Members.

TABLE OF CONTENTS

Contents

Annual Meeting June 12, 2016 Agenda _____	1
Minutes: UUCM 2014 – 2015 Annual Meeting _____	2
2016 Reports _____	3
Minister’s Report – 2016 _____	3
Report from the President _____	4
Report from the Treasurer _____	5
Report from the Auditors _____	5
Report from the Auction Committee _____	6
Report from the Bartlett Fund _____	7
Report from Building & Grounds _____	7
Report from the Caring Community _____	8
Report from the Committee on Ministry _____	9
Report from the Financial Stewardship _____	9
Report from the me&thee Coffeehouse _____	9
Report from Membership _____	10
Report from the Music Director _____	10
Report from the Nominating Committee _____	11
Report from the Over 60 Gang _____	11
Report from the Pastoral Care Associates _____	11
Report from the Red Bow Committee _____	12
Report from the Religious Education Committee _____	13
Report from the Social Action Committee _____	13
Climate Change (Seventh Principle): _____	14
Family Promise: _____	14
Lifebridge Meals: _____	14
Nepal Reconstruction Assistance _____	14
Racism and White Privilege: _____	14
UUs for Justice in the Middle East (UUJME) _____	15

TABLE OF CONTENTS

Welcoming Congregation – 2015:	15
Report from the Stetson Art Gallery	16
Report from Sunday Seminar	17
Report from the Tricentennial Steering Committee	17
Financials	19

Annual Meeting June 12, 2016 Agenda

- I. Call to Order
- II. Introduction of Parliamentarian
- III. Opening Remarks
- IV. Secretary's Report from Annual Meeting 2015
- V. Minister's Report
- VI. President's Report
- VII. Treasurer's Report
- VIII. Audit Report
- IX. Proposed Budget
- X. Presentation by Tricentennial Steering Committee
- XI. Presentation of Awards
 - a. Ministry
 - b. Social Justice
 - c. President's
- XII. Resolutions Before Congregation
 - a. Authorization for Bartlett Fund transfer
 - b. Proposed Name Change
- XIII. Election of Officers
- XIV. New Business
- XV. Adjournment

Minutes: UUCM 2014 – 2015 Annual Meeting

Call to order at 12:06 by Mark Wilhelm, President; Moment of shared, quiet gratitude led by Reverend Wendy von Courter; Quorum confirmed present: 69; Parliamentary: Mark Horrigan provided a brief review of the process. Roberts Rules will be used.

Secretary's Report: Robin Ronchi currently away; minutes from the June 2014 Annual Meeting moved, voted & accepted as printed on page 2 in the Annual Report.

Minister's Report: Reverend Wendy von Courter summarized her report (page 3), which was accepted by membership. She expressed gratitude to all who served on the Board of Trustees this year, & gave a special thank you to everyone that she & Gini were able to share their sacred wedding here at UUCM.

President's Report: Mark Wilhelm reviewed a year of great happenings – some more visible, some equally important, but behind-the-scenes. He stated his pleasure at the work that the Board of Trustees, the Visioning Team, Building & Grounds, & other committees have accomplished this year.

Treasurer's Report: Mark Klopfer presented the summary of last year's operating budget & the proposal for Fiscal Year 2015. The treasurer's report was moved & accepted as printed in the Annual Report. A discussion of the Fiscal Year 2015 budget provided answers to several line items of the budget. The proposed budget was moved & accepted as printed in the Annual Report. Mark thanked Gordie Corzine & Cindy Loewen for their audit. Alisa Manning spoke briefly about Stewardship (report on page 9).

Presentation by the Tricentennial Steering Committee: Hugh Stewart shared the plans for UUCM's upcoming tricentennial year – some geared toward looking back (Meetinghouse Series, time capsule, etc.) & some looking forward (300 for 300th Campaign – to raise \$300,000 for building updates).

Presentation of Awards:

Ministry Award: presented by Bill Smalley to Kathy Sands-Boehmer, Anne Mitchell, & Dottie Stevens

Social Justice Award: presented by Jack Weltner to Trish Sullivan

President's Award: presented by Mark Wilhelm to Alisa Manning

Resolutions Before Congregation:

Visioning Team Proposal: Mary Gardner presented a proposed Vision Statement, along with an outline of Next Steps for the Visioning Team. The proposal was accepted. After discussion, the Vision Statement was moved, voted & accepted as printed.

Social Action Proposal: Linda Weltner presented the proposal (page 13) to end all direct investments in major fossil fuel corporations. The proposal was moved & accepted. Discussion took place. The motion has carried, with 5 abstentions.

Building Security & Changing Locks: Mark Wilhelm discussed a growing concern about building security, items disappearing, & potential liabilities due to our current, very commonly known combination. A plan to change the locks & limit those with access was mentioned, with some discussion. Implementation is still in the works.

Election of Officers: Hugh Stewart thanked the other members of the nominating committee, Ellen Garipey & Cheryl Wolff-Variam. A motion to close the nominations passed, & Peter Kent moved that the Secretary record a unanimous vote for the slate of the nominating committee. This motion was carried unanimously.

2016 Reports

MINISTER'S REPORT – 2016

As this year comes to an end, so too, a decade of ministry together! This year marked an important point for us as we moved into implementation phase in response to our visioning process. While we tended celebrating our 300th birthday, we were also busy moving forward. Some things we tried worked well and others fell short. As is so often the case, the pathway through failures results in larger gifts than the immediate successes. This is the work of progress!

With the sudden departure of our Director of Religious Education, we moved to a model of more multigenerational time in worship and greater involvement of the minister in planning and execution of religious education programming. While multigenerational worship should always be an important piece of how we are together, the shift impacted the balance of worship for many. Additionally the time required for adequate RE supervision was unrealistic. A mid-year course correction by the Religious Education Committee was necessary and thanks to the co-chairs Susie LaBrie and Betsy Albee, the hiring of our new Director of Religious Education, Dawn Trethaway was expedited. The RE Committee also stepped in to manage lesson plans until the new hire arrived. This journey also resulted in a higher degree of engagement by the Religious Education Committee, the formation of a parent's spirituality group, an egg-decorating event that drew record-high numbers, the addition of monthly sleepovers and a year-end retreat for our youth. We are excited about the increasing numbers of families participating in our programs and are planning more family-friendly congregational events for the coming year.

Lunch Bunch continues to be well attended, but the plan of adding a monthly brunch proved less attractive so we moved back to the once per month model. We continue to see 20 or more people at these gatherings and while we claim them as 'business-free-zones' some have drifted into fascinating theological discussions. While we do not want to detract from the popularity of the lunches there may be room for the addition of theme-based conversations following the social dining time.

New this year was the additional of Spirit Circles. Between Heart to Heart and Soul to Soul, the program met 23 times for 2 hour sessions, with 15 people participating. Topics included: listening, balancing, gratitude, balance, doubt, life after death, blessings, success and failure, play, shadow sides, compassion, spiritual experiences and many more. The program will be continued in the coming year and a third time slot will be offered in hopes of engaging greater numbers.

This year also included an invitation to offer more feedback about the UUCM experience. Working with the Committee on Ministry, we've just implemented a feedback loop named Our Voices Matter. The first one focused on the Sunday Morning Experience and others will follow inviting UUCMers and friends to let their voices be heard. This is an important piece of how we best move forward in achieving our vision of greater relevancy in the lives of current members and those we are welcoming into our faith community.

Ministry does not happen in a vacuum. Neither does it happen alone. As we close the 2015-2016 year I am so appreciative of our lay leaders and of our magnificent staff.

Working with the board and the many leaders of our committees continues to be a pleasure. Anytime volunteers dedicate their time and talent to an organization it is a sacred gift and UUCM is the recipient of so many of those gifts. It is humbling and exciting to see such passion for UUCM and what ensures UUCM will be around for future generations. From the hustle and bustle of Red Bow fair preparation to the monthly Pastoral Care Associate, Committee on Ministry and Board meetings and all others in between, the volunteer base of UUCM is one of our most

important assets. Beyond appreciation for the work of these volunteers, I also have gratitude for the ability to know UUCMers and friends more deeply in these settings.

In terms of our staff, Eduardo and Ilma are a wonderful presence and mostly unseen as they care for our building. They do so with love and appreciation of this community. Christina has quickly become the glue that holds us together particularly in years in which we have so many moving pieces. Her humor, agility and resiliency are essential in her role as our administrator and her eagerness to support new efforts has been a vital fuel in helping us be successful. Lunch Bunch is a great example of this. Dawn is very new but feels like she's been here for years. Her depth of experience in education coupled with her ability to rapidly, calmly and enthusiastically adjust to meet the needs of any Sunday's attendees is a gift to our program. And Karen, our music director, has risen to even higher heights this year as we called upon her and the choir to participate in the Tricentennial Service, offer a special concert and then, unexpectedly celebrate the lives of our beloved pianist, Sandi Peaslee and fellow choir member, Gary Griffiths. Karen's remarkable leadership is equalled only by her exquisite mastery at the piano. This is a year we have been the recipient of far more of both than is written in any agreement.

I would be remiss if I did not mention how appreciative I am for all the voices and embraces of support this past year as we navigated my mother's illness. Your grace in adjusting schedules and supporting me were such a gift. Your kindness to her with the many cards and expressions of care were treasured. Thank you so very much.

Yours on the Journey,

Rev. Wendy von Courter

REPORT FROM THE PRESIDENT

What an amazing Congregation. This had to have been the most active, busy, fulfilling year in the history of our Congregation.

Many of us enjoyed the Family Retreat at Ferry Beach again this year. Late Fall was filled with many activities in preparation for our Red Bow Fair which opened the Holiday Season, with the added bonus of exceeding the income budget for it. The participation of many members in the preparation and staffing the tables made it a fun and happy and rewarding day for all.

The choir, under the able and dedicated director Karen Gahagan, presented a wonderful Christmas service with much joyful singing by all. In the spirit of ecumenism, several members of our choir, joined the "Old North Church" Choir for their memorable concert as well.

Pursuant to a vote of the Congregation 2 years ago, we were finally able to welcome Family Promise and their homeless families for a week. It took much time and effort to fully comply with the Building Inspector's list of things that need to be changed, The Fire Department inspector's and Police Department, to coordinate the safety of all participants and the Board of Health approval for the method of feeding the families. But, we were successful and were able to welcome our guests, albeit with some misgivings by our neighbors. Our first week of hosting was nearly seamless and the fears of some neighbors were sated. We are looking forward to our second week this coming August. Thank you to all who assisted, participated and especially to Nikki Moore, Cindy Moore, Steve Krom and Mark Wilhelm for the tireless efforts to help make this event happen.

The Youth group continues to grow in numbers and spirit. Many overnight sleepovers were accomplished with the aid of parents, Reverend Wendy with assistance from Ani Chickering. Once a month the Youth participated in the preparation and serving of meals at the Salem Mission for those less fortunate that need help. Good Job! We have a wonderful group of children and young adults taking up our Liberal banner for the next generation of UUCM'ers.

As we headed into the spring, the only thing not grand about the winter was the almost complete lack of snow, this following a record snow fall from the previous year. No one complained except for our skiers. The lack of snow permitted us time to spruce up the building and prepare for the GRAND Finale our 300th Birthday party.

Oh, I must mention that we celebrated our 300th Anniversary all year long. Well, we did. Big time! Hugh Stewart and Mary Gardner had activities scheduled all year long to help us celebrate. We owe a deep debt of gratitude to both Hugh and Mary for their foresight, planning and work on many diverse activities. None was quite as spectacular as the Gala, which included town officials, all the town's clergy, UUA officials and friends and UUA congregations that are our neighbors from surrounding towns and cities. Much thanks needs to be sent to Cindy Moore and her Crew that prepared and served nourishment to all the attendees, w/o much financial support by the UUCM [the coffers had run dry by the end of the year]. We transitioned to a new security system, with mostly understanding and patience from our members and the users of our Home. It seems to have settled down at the end of the year as we all got used to the new realities of the world.

As usual, we welcomed many new members, friends and visitors just taking a peek at what we crazy UU's were up to now. Sadly, we lost several long time members whose death took them from us. The wheel of life turns steadily, and although this writer has other plans, death is the long term [we hope] end result of being born.

See you all during the next Church year.

REPORT FROM THE TREASURER

During my second year of the two-year treasurer term, we have fully completed the development of QuickBooks for accounting in collaboration with Christina Aubin, the Church administrator, and Denise Roy, CPA, the church accountant.

In late spring our operating checking account again went into negative balances in March and April, incurring bank charges at Marblehead National Grand Bank. By the end of May we were able to overcome these shortfalls and end in a good position with our Line of Credit at National Grand now with a reserve of \$12,000 for our 'Business Line of Credit' and \$7,000 on our Secured Business Loan which is used if the Business Line of Credit has been used. This is an increase in reserve from \$1,000 in reserve on the Secured Business Loan from the end of last year. Our bank accounts show a strong balance at the end of the year, primarily due to prepayments on FY2017 pledges.

There continue to be concerns about diminishing pledge amounts and rental income for the upcoming year. The proposed budget shows slight decreases in income and a corresponding decrease in expenses. Fiscal year 2013-14 saw strong support of the Bartlett Fund that allowed the church to undertake the major project of painting both the sanctuary interior and church exterior for \$49,084.

The printed reports show the fiscal year (FY) for all transactions through May 15, 2016.

Mark Klopfer, Treasurer

REPORT FROM THE AUDITORS

As of this writing (for publication), we have only started the audit of the Church financials. Unforeseeable personal issues have delayed our work and the available time is severely limited.

Our goal is to examine all account balances, randomly choosing specific transactions and selected accounts, including the Silver Trust, for in-depth review and comparison to account statements.

Based on the audit work done for last fiscal year, we expect to find specific bookkeeping records that might be changed and improvements that might be considered. However, the changes we expect to recommend are unlikely, in our opinion, to materially impair the utility of the presented reports as to assets and liabilities, for evaluating past performance, or considering the future budget. All detailed comments and recommendations will be passed on to the Presidents, Treasurers and Accountant.

In the event some audit findings or insufficiencies seem significant, they will be explained in the verbal Auditor's Report and should be found in the minutes of the Annual Meeting.

We will leave it to the Board and accountant to consider our observations and make any changes we suggest based on our audit, if they deem it desirable to do so.

We would like to say that we are all very fortunate to have the services of our administrator Christina Aubin to do the detailed bookkeeping, and also, in particular, the pro-bono services of Denise Roy, C.P.A. We also commend Mark Klopfer, and Mike Gery for their efforts to run this highly complex little enterprise.

Respectfully submitted,

Gordon Corzine and Mark Horrigan

June 7, 2016

REPORT FROM THE AUCTION COMMITTEE

Our Annual Auction which was held Saturday May 14, 2016. The committee consisting of Peter Kent, Alisa Manning, Beth Koniarens, Michael Austin, Hazel Grenham and Bill Smalley met regularly to establish a theme and format.

Given the success of the Broadway Musical sing along held last year, we decided to revive the idea, incorporate it into the auction and make our theme "A Night on Broadway". Thanks to the wonderful musical presentation prepared by Karen Gahagan the night was a great success. Who knew we had such great talent among us? Michael Austin, Jessica Garcia and Alisa Manning rocked the house earning standing ovations for their solos.

Alisa Manning once again took on the difficult task and time consuming task of data entry utilizing a new program to track every aspect of the auction. She oversaw data entry on the night of the auction with the help of Linda Enrico and Christine Krom. Alisa and Beth Koniarens created a letter soliciting donations from the merchants in town. Packets were put together and Beth set out with packets in hand and pretty much single handedly solicited most of the silent auction donations. Beth oversaw the set-up of silent auction tables.

Once again Craig Garipey stepped up as the entertaining auctioneer with his sidekick Cheryl Wolf-Variam. Hazel Grenham and Nikki Moore agreed to do publicity & Linda Enrico committed to producing the design for our posters. Hazel and Michael Austin started early working on the sale of 52 cards. Tricia Sullivan was the lucky winner and chose the driveway seal donated by the men's group. Ellen Garipey volunteered to oversee decorations & along with the help of Michael Austin, Jill Frucci, Charlotte Travis, Sonja Hoover and daughters Olivia and Aria transformed the church into a festive atmosphere. Linda Enrico entered all the winning silent auction bids into the system.

Thanks to Dana McKinnon-Tucker and her unique ability to handle our younger generation, we were able to successfully host a sleepover on the same night as the auction. Carol Thompson & her capable helpers Marlaine Mahady-Potter and Janet Powers provided refreshments straight out of Bon Appetite. Jean Rostron & Christine Krom sat at the front desk to collect admission, register people and distribute paddle numbers. They also helped with checkout. Our dependable cleanup crew of Steve Krom, Paul Tremblay, Paul Travis and Naushad Variam stayed to

make the church ready for Sunday's service. Thanks to the wonderful donations by our church members and merchants and those who generously bid on items, we contributed just under \$12,000 to the church coffers.

Respectfully submitted, Sheila Donovan, Auction Chair

REPORT FROM THE BARTLETT FUND

The Bartlett Fund, unlike the annual pledge drive, which pays for our operating budget, welcomes bequests & gifts for the capital improvement & needed infrastructure programs of the church. It is important that members remember the Bartlett Fund in the future as we need to increase its size & importance to our church's future.

This year the Bartlett fund received donations in memory of Sandi Peaslee, Gary Griffiths, Frank Cagluiso, and Howard Amidon.

It also received a donation in honor of Wendy.

These donations totaled \$925.00

There was also a donation from the me&thee Coffeehouse for broken window repair in the amount of \$65.00.

Total donations were \$990.00

REPORT FROM BUILDING & GROUNDS

The 2015-16 year seemed really busy:

1. The Sanctuary and the outside of the entire building were painted, and in some places repaired. This project ran well into the fall and, while not inexpensive, resulted in a better building.
2. As the painters were leaving the preparation for Family Promise continued. They and others worked on repairing windows, making screens and curtains, and generally attacking needed tasks. The professionalism and competency of Dan Sherwood and his crew was appreciated.
3. On November 17, 2015 a new refrigerator was delivered. This presented an opportunity to "clean out the kitchen". This constantly used room continues to require weekly attention if it is to remain safe, clean, presentable, and legal.
4. DURING December and into MID-JANUARY we completed the required steps to host Family Promise (FP).
5. DURING the week of January 24, 2016 four families who were part of the FP Program successfully and safely stayed at the UUCM. As several people NOTED (SOME of them from other parts of the north shore), this is where a church "walks the walk" and not just voices the desire to do "something". While some organizational bumps in the road became apparent, the week was a quiet success. The Town of Marblehead hardly noticed. Several people asked: "When are those families going to be at your church?" weeks after the event.
6. Starting in the spring of 2015, THE Committee on Ministry, the Board of Trustees, and the B and G Committee discussed changing and upgrading the lock system on the outside doors as well as several interior doors. As exemplified by the phrase "Half of Marblehead knows the combination" and by the fact there was not a clear record of who had keys to which doors, a consensus grew that an improvement was needed. Besides frequent theft of office supplies and food over the previous 2 years, there was a concern about the Church's liability in regards to art on display in the Stetson Gallery, and possessions of paying customers who use the building. We were also wanted to improve security with Family Promise families visiting us.

After a good amount of research, and much in house communication, a new lock and CODE SYSTEM was installed on March 16, 2016. As expected, there has been some interpersonal adjustment needed when a culture shift of this type occurs. Indeed, a “new, new code” was quickly and unfortunately required; the details of use and mechanics were adjusted (i.e. who gets the codes, the keys, and what doors work and what ones need fixing); and a wireless door bell was installed in early May.

As a result, the building is much more secure, and the employees and the congregants who use it at various hours feel (and are) safer. Mark Wilhelm deserves special recognition in persevering during the discussion and installation of this system.

7. After decades of faithful service, Ann Mitchell passed the supervision of the Book Stall to Gini Bowen. Ann did yeoman’s service (Can a woman do yeoman’s service?); and Gini, a long time Marblehead resident and former librarian, is a worthy successor. After some major surgery to the inventory, and some cleaning of the shelves, the room is ready for new uses, which are yet to be determined. It continues to be open for its original purpose of receiving and selling good quality used books.

8. The Town of Marblehead with some gentle reminders cleared their section of the Harris Street cemetery in very early July 2015. Some limited participation on Saturday Work Days resulted in the grounds being kept mostly under control. The rooms above Stetson are more usable as is the basement. The general removal of material (“stuff”) from the building has resulted in cleaner and more functional rooms. The leak above the office was found and repaired.

I want to sincerely thank the long standing BandG Committee of Bill Smalley(first among equals), Mike and Lisa Gery, and Hilary Doliber. Without their help and experience much of the above would not have happened. Lisa monitors the upkeep of the grounds. She and Mike placed the first memorial stepping stone in the Garden in June 2015. There are others (“adjunct members”) who are around and ready to pitch in when asked. However, if one names them one risks leaving someone off the list. I do not want to commit that error. You know who you are and THANKS.

It is my opinion that now that it is painted the building needs a NEW KITCHEN. I am not sure we have the money, the will, or the organization to make this task happen, but we need it whether we do or not.

Peace. Out.

Steve Krom

REPORT FROM THE CARING COMMUNITY

The Caring Community is designed to help people with immediate need such as rides to church or medical appointments, meals post hospital stays, or other short term help. We have been using the website “Lotsa Helping Hands” to organize this endeavor. The idea was that it would be easy for people to see the needs, and respond in a timely fashion. This has not proved to be the case. Feedback would be greatly appreciated. It is time and people intense to have a telephone tree, and we would like to have a solution that works for those with needs, and those willing to volunteer. Please share your thoughts so we may find a workable solution in person, emailing or calling. We want this program to work!

Sheila Cran-Barry

Coordinator

REPORT FROM THE COMMITTEE ON MINISTRY

The 2015-2016 Committee on Ministry (COM) was comprised of the minister, Wendy von Courter, and three church members: Steve Krom, Patricia Sullivan, and Cindy Moore. COM members are chosen by the minister and approved by the Board of Trustees. The Committee's purpose is to promote UUCM's philosophy of shared ministry while being in right relationship with each other, to provide support and counsel to the minister about congregational and ministerial concerns, and to serve as a liaison between the congregation and the minister. We encourage and help facilitate direct, respectful communication between UUCM members and the minister and with each other, always with the goal of maintaining people's dignity and privacy. The COM communicates with the Pastoral Care Associates to assure that persons in need are attended to, and with the Board of Trustees and other church committees as needed.

We met once a month in Wendy's office to discuss the successes and challenges of her ministry and to strategize, when necessary, around concerns from the congregation. For example, we discussed reactions to the November sermon series on gratitude, and to the introduction of new locks on the doors of the Meeting House. We also discussed the merits of obtaining feedback from a frequent, brief survey of Members and Friends, and considered how this could best be implemented to facilitate open communication.

The Committee also served as a source of reflective guidance for Wendy and as a watchful eye on her well-being and health as a parish minister. This aspect of the Committee's charge was again emphasized this year, as our continued numerous losses as a congregation led to significant pastoral demands on Wendy.

In May, we said a reluctant good-bye to Steve Krom as he stepped down from the Committee, and welcomed two new members, Hazel Grenham and Dan Tucker. We hope that UUCM members will feel free to contact any member of the Committee on Ministry at any time.

Steve Krom, Cindy Moore and Tricia Sullivan

REPORT FROM THE FINANCIAL STEWARDSHIP

The canvass carried out between April 10th and May 1st yielded 149,941 from 76 pledging units. This compares with 143,992 from 65 households last year. About half of the income comes from 5 households. Two regular contributors moved to assisted living facilities in the past year. A number of people moved away. Other households reduced their pledges based on individual circumstances, but several others raised theirs. Overall it feels that for the most part people pledged what they could. However, the church clearly needs more resources if it wishes to maintain its commitments to salaries, the building and utilities. The answer seems to be that we need to increase the size of the congregation. We need more members and therefore more pledging units. As co-chairs of the EMC this year we would recommend that the Stewardship committee work closely with the Membership Committee in coming years, and that EMC dates and Chairs be established early in the Fall.

Carolyn Corzine and Sheila Cran-Barry Co-Chairs

REPORT FROM THE ME&THEE COFFEEHOUSE

The me&thee continued to flourish in its 46th year and is much acclaimed by performers across the country. Run by an all-volunteer Board which includes, church members Kathy Sands-Boehmer, booking, Anthony Silva, door, Marlaine Potter and Carolyn Corzine kitchen and Gordie Corzine, treasurer, and a host of other volunteers, the Coffeehouse put on 26 shows this year, drawing from many styles of folk music. By having a diversely curated season which ranges from traditional folk to bluegrass to a cappella to roots, we are able to cater to different demographics and attract new audiences. We operate most Friday nights from September thru May, and have provided music to the

schools twice this year thru the Beatles Benefit. We donate the profit earned above operating expenses to the church every year. This year we have contributed \$5798.

Carolyn Corzine, Chairperson for the me&thee Board

REPORT FROM MEMBERSHIP

The Membership Committee met and planned a fall 2016 strategy to revamp brochures and processes to engage existing, new and potential members more actively. Linda Enrico and Linda Weltner are working with the minister on this effort and are looking forward to welcoming other UUCMers into the process. A newcomer's breakfast was also held and new mugs were made available for those wishing to identify themselves as newcomers during social hour.

This congregational year welcomed Jessica Garcia, Sonja Hoover, Andrew Dunlop, Connie Coffin, Jordan Caress and Emily Wheelwright into membership.

WELCOME! We are glad you are here!

REPORT FROM THE MUSIC DIRECTOR

This has not been a typical church year for the choir and music program. The loss of beloved members of our choir family, pianist Sandi Peaslee and bass Gary Griffiths in March impacted us on many levels; yet, these losses have been countered with much joyful music making.

The choir sang an average of three Sundays a month this Church year as well as Christmas Eve. The group also sang at the Thanksgiving Interfaith Service - a service where the collection was reported to be the largest to date for this service and it was suggested that the choir's exceptional singing helped that cause. I'm certain it is true!

The choir supported the tricentennial celebration with 3 choral offerings at the April 3 celebratory service and with the presentation of our first ever concert on April 24. The concert group included several individuals from beyond UUCM's walls who are participants in Old North Festival Chorus, the Old North choir, the UU Church of Greater Lynn choir, among others. It was so wonderful to have choir friends from the community be a part of this special event as our choir stretched its skills and expanded its musical experience. The concert was well attended and enthusiastically received by the audience.

We continue to enjoy a solid group in terms of vocal resources which allows us more flexibility; however, the goal continues to be finding the balance between challenging and accessible work that supports the needs of each service.

Thanks to special guests Matt Meyer and Deb Cherry's grandson, the remarkable violinist Nash Ryder. Bravos to Michael Austin, Jessica Garcia-Rizzo and Alisa Manning for their amazing solo contributions to this year's auction which included a Broadway sing along. I am also grateful to the two pianists in addition to Sandi Peaslee who supported our work this year: Sanae Kanda and Joseph Stroup.

Of course, the biggest thanks must go to the choir who continue to commit large amounts of time and energy to the music program and who since the New Year have been navigating some difficult emotional space as well. This spring has required a significant number of hours beyond their regular rehearsal night on Mondays as well as practice on their own. On Sundays that we sing, the group is here first thing in the morning.

Making music with them continues to be a joy and their contribution to UUCM's worship life is a genuine gift of themselves.

Karen Gahagan, Music Director

REPORT FROM THE NOMINATING COMMITTEE

The Nominating Committee respectfully submits the following slate for the 2016-17 term of the UUCM.

Respectfully.

Ellen Gariepy, Cheryl WolfeVariam, Cindy Moore

Position	Term	Present Officer	Nominated Officer
President	1 Year	Peter Kent	Paul Travis
Vice President	1 Year	Paul Travis	Sheila Donovan
Secretary	2 years	Susie LaBrie	Susie Labrie
Treasurer	2 Years	Mark Klopfer	Alisa Manning
Assistant Treasurer	1 Year	Jean Hamburg	Jean Hamburg
Trustee	2 Years	Patrice Helmuth	Patrice Helmuth
Trustee	2 Years	Alisa Manning	Christine Krom
Trustee	2 years	Nikki Moore	Nikki Moore
Auditor	1 year	Mark Horrigan	Gordie Corzine
Auditor	2 Years	Gordie Corzine	Laurie Labrie
Silver Trustee	1 Year	Mike Gery	Mike Gery
Bartlett Fund Trustee	1 Year	Gini Bowen	Gini Bowen
Bartlett Fund Trustee	2 years	Brad Martin	Sheila CranBarry
Bartlett Fund Trustee	3 Years	Sheila CranBarry	Peter Kent
Nominating Committee	1 Year	Ellen Gariepy	Cheryl Wolf Variam
Nominating Committee	2 years	Cherly Wolf Variam	Cindy Moore
Nominating Committee	3 Years	Cindy Moore	Anthony Silva

REPORT FROM THE OVER 60 GANG

Submitted by Dorothy Stephens & Bill Smalley

The Over 60 Gang, with about a dozen members, met in the Nichols Room from 9:30 to 11:30 on the second Saturday of every month during 2015-2016 for coffee, snacks, and conversation about topics of interest to people our age. Some of those topics included plans for the tercentennial celebration, divestment from fossil fuels, the church budget, the RE program, Safe Driving for Seniors, and transportation for Seniors including The Ride. We were also pleased to have a visit and discussion with Rev. Charles Wilson, Minister Emeritus.

We begin our meetings with an Opening Reading, then a check-in that allows us to know what is happening in EACH OTHER'S' lives and provides an opportunity to offer support, sympathy, or congratulations. Close friendships that continue to deepen have developed as a result. When we recently lost our member, Gary Griffiths, three of the women in our group stayed by his bedside through his final illness, and took on the task of clearing out his apartment after his death.

Our meetings end with a Closing Reading

REPORT FROM THE PASTORAL CARE ASSOCIATES

We began this year with twelve PCAs: Jack Weltner and Paul Travis as co-chairs, Charlotte Travis, Mary Zalewski, Sheila Cran-Barry, Sheila Donovan, Trish Sullivan. Christine Krom, Jay Morrison, Cheryl Wolff-Variam and Cindy

Moore. Very sadly, Cheryl and Cindy have resigned after years of great service. Paul Travis, our co-leader all year, has just resigned to become our Church president. And Trish Sullivan has agreed to replace him as co-chair with Jack.

Mary and Charlotte are now on temporary leave. We are delighted that Michelle Martin is our youngest, newest member! She has joined Sheila C-B in heading the Caring Connection.

As always, the Covenant of Confidentiality has been primary. We have revisited other basics such as active listening and boundaries in our PCA relationships, and we have explored important new areas this year.

We have continued our practice of having two PCAs available every Sunday to assist with candles of Joy & Concern.

Most importantly, under Rev. Wendy's supervision, throughout this year we PCAs have served as sensitive, supportive "eyes and ears" and provided a listening, caring, and spiritual presence to many members of our church community.

Respectfully, Jack Weltner

REPORT FROM THE RED BOW COMMITTEE

2015 Red Bow Fair!

The 2015 Red Bow Fair highlighted our ability as a church community to come together to raise needed funds in a celebratory fashion. Each and every one of us should be proud of what the Congregation accomplished while having fun at our Fair!

The planning for the Red Bow Fair began in earnest in the Fall and extended through the long anticipated raffle drawing just prior to Christmas.

A huge thank you is extended to the table chairs- Gift, Christine Krom; Greens/Wreaths, Sheila Donovan ; JoAnn Silva, Linda Beattie, Baskets; Chuck Scheffreen, Electronics; Sue Levine and Grandchildren, Bagels and Coffee; Carol Thompson, Café; Kathy Sands Boehmer, Bake; Children's Room, Dalia Barrett and assistants; Megan Parsons, White Elephant Room; Mary Gardener and Ann Mitchell, Book Stall; Anthony Silva and Gordon Corzine, Fiscal Operations; Linda Weltner, Mrs. Claus; Marlaine Mahady Potter, Poster Distribution; Linda Weltner, Shelia Donovan, Craig Gareipy, Dollhouse; Robin Ronchi, Raffle; Mrs. Sue Moore, Quilt donation; Sue Levine and Grandchildren, Harbor Distribution of Fair Promotional Fliers; Hazel Grenham, Publicity; Carolyn Corzine, Social Action Table; Mark Klopfer, Treasurer; Peter Kent, President.

Also, many thanks to the Building and Grounds Committee and their chair, Steve Krom, for managing the set up and clean-up of the Fair. And appreciation is extended to Bill Smalley for his guidance and assistance wherever and whenever it was needed. Thank you to President Peter Kent for his huge support and guidance.

AND to all the helpers, who crafted all the fabulous baskets and wreaths and arrangements, knitted, prepared/served Café food, table sat, helped with set up and clean up, sold and bought raffle tickets, baked and baked some more..... it absolutely required all the talents of the church membership to put on The Red Bow Fair!

And to all you elves who donated money, items, sold raffle tickets and provided other hidden support.....and to those we missed--- Thank you!

And thanks to all the family members who put up with their loved one's absences- Thank you!

And thank you to Christina Aubin who always was so cordial and helpful when her work and office were disrupted— Thank you!

And gratitude to all of you who attended The Red Bow Fair because without you it would not be the Red Bow Fair!

Combined the Baskets, Greens, , Gift , Raffle, Children's Room, Social Action Table, White Elephant Room, Red Bow Café, Electronics, Bake, Coffee& Bagels and Book Stall raised a net of \$8,534.91! A job well done!

Respectfully Submitted,

Marlaine Mahady Potter, Red Bow Fair Chair

REPORT FROM THE RELIGIOUS EDUCATION COMMITTEE

2015-2016 has been a year of transition for UUCM's Religious Education Committee. With the sudden departure of our Director, Irene Praeger, the RE Committee focused on securing a stabilizing leadership presence for the start of the new year and developing a job description for the new position going forward. The time of transition afforded the committee an opportunity to redefine the DRE job to be more in line with the needs and size of UUCM's families.

In line with this focus, the RE Committee supported the temporary hire of Delia Barrett to maintain Sunday morning offerings as the search process began. They then met throughout the year to do the following:

- * Work with the minister to support the existing program
- * Create lesson plans in line with monthly worship themes
- * Develop a job description for the DRE position
- * Conduct the job search
- * Hire the new DRE
- * Support the creation of a parent's group
- * Support the minister in the addition of monthly sleepovers
- * Develop plans for congregational year 2016-2017 to increase engagement of families and the larger congregation through multigenerational activities
- * Welcome new families

As we close the year, we are pleased to have Dawn Trethaway as our newest staff member. Dawn came on board first in the role of an additional RE teacher and then interviewed for the DRE position. She brings a wealth of experience in early education and has eagerly attended trainings in UU Religious Education. With Dawn at the helm we feel confident our RE program will continue to stabilize and transform to best meet the unfolding needs of our children, youth, families, congregation and seekers at our door.

Respectfully submitted,

Religious Education Committee Co-Chairs, Betsy Albee and Susie LaBrie

With appreciation for the participation of Dana McKinnon-Tucker, Marlaine Mahady-Potter and Loretta Bogosian

REPORT FROM THE SOCIAL ACTION COMMITTEE

The Social Action Committee has met the 2nd Sunday of the month throughout the year. Membership in the Committee is open to all. It serves as a support for the members who are actively working on the wide range of interests and social justice concerns of its members ranging from local to international.

Climate Change (Seventh Principle): Although no new initiatives have been undertaken this year, climate change remains an on-going concern of the Committee. Gordie and Carolyn Corzine attended Mass Advocacy Day, which is sponsored by UU Mass Action, and attended the education sessions prior to meeting with aides of our Senator and Representative to support clean energy initiatives being considered at the State level.

Family Promise: During the 2015/2016 church year UUCM hosted a group of four families from the Family Promise North Shore Boston program. The families were housed at the church for one week in January, during which numerous volunteers from the congregation, as well as several volunteers from the community (not affiliated with UUCM) provided meals and hospitality for our guests. The experience was rewarding as well as educational, and the families felt welcomed and well cared for. We are scheduled for another host week in August.

UUCM will be holding additional training sessions for those interested in participating in Family Promise. Dates and times of upcoming sessions will be published in the newsletter. If you are interested in learning more about the FPNSB project &/or volunteer opportunities, please feel free to contact any member of the FPNSB task force: Nikki Moore, Patrice Helmuth, & Cheryl Variam.

Lifebridge Meals: (aka Salem Mission, aka Crombie Street) as for many years past, our church has served the evening meal at Lifebridge two Thursdays and one Wed. each month. Jack Weltner arranges the second Thursday and Judith Black coordinates the fourth. Wendy coordinates the second Wed meal. And our youth group does a meal each month!

About 8 volunteers work in each group. Usually we serve about eighty people. Judith and Mike Elkin, Tony Toledo, are long term veterans, as are the entire Garipey clan. Other veterans include Philippa Longin, Debby Colson, Kevin Robichaud, Olivia and Sabin James, Devon Hildreth, Deb Cherry. Don Hulbert, Rob, Jen and Luca Ferro, Tom Gale, Great new additions this year include Kelly Rigby, Sue Barnard and Dan Gross.

Thanks to you as a congregation for supporting us with money (this year once again, the board has given us a budget to help with expenses) and with donations of food and clothing. Jack Weltner (781-631-8581) is responsible for the second Thursday of the month.

Anyone interested in helping out should contact any of us to make arrangements.
Jack Weltner

Nepal Reconstruction Assistance: Tricia Sullivan continues to coordinate with her medical and therapy colleagues in Nepal to develop rehabilitation services there. She established Rehab Nepal Inc. to serve as the charitable organization to house donations. Tricia has presented to UU congregations and other organizations, and submitted proposals to foundations.

Racism and White Privilege: This past year several members of our church community were involved in the Marblehead Racial Justice Team and were responsible for several events including a town wide showing of the documentary *Traces of the Trade: A Story from the Deep North* wherein filmmaker Katrina Browne discovers that her New England ancestors were the largest slave-trading family in U.S. history. She and nine cousins retrace the Triangle Trade and gain powerful new perspectives on the black/white divide. Also, the Team prepared for a second showing of *Mirrors of Privilege: Making Whiteness Visible* with conversation facilitated by Rev. Wendy and Nikki Moore. The Team coordinated an event on January 31st, where Debby Irving, author of *Waking Up White* and *Finding Myself in the Story of Race* made a presentation at Marblehead High School.

Susan Morrison, Member of the Marblehead Racial Justice Team

UUs for Justice in the Middle East (UUJME) Carolyn and Gordie Corzine and Susan and Jay Morrison continue to participate in the Steering Committee of the MA Chapter. We have attended educational meetings put on by UUs, Friends, Jewish Voice for Peace and others. At present we are working to pass a Business Resolution at General Assembly calling for the UUA to divest from corporations which violate the human rights of Palestinians who live on the West Bank. Currently specifically identified are Caterpillar, Hewlett Packard and Motorola, but the hope is to generalize the resolution to be sure that no further investments are made in similar companies. Gordie and Carolyn are going to GA as delegates and will participate in this vote, and are trying to involve delegates in other North Shore UU Churches in this effort.

Welcoming Congregation – 2015: Affirming the Bisexual, Gay, Lesbian and Transgender Community

In order to continue our desire to be a Welcoming Congregation, we continued many of the programs that we have had for several years.

On-Going Education: Throughout the year we continue to educate the Church Community about current events concerning the GBLT community and our responsibilities towards the acceptance of Diversity in our Nation.

While the below comments are very positive and heading in the right direction for the recognition and respect of people as they are, we have to also remember that not everyone in every country is treated with 'the inherent worth and dignity' that they deserve. There is still a lot of work to do.

Marriage Equality Status: Prior to 2004, same-sex civil marriage was not recognized in any U.S. jurisdiction. On June 26, 2015, the US Supreme Court ruled that same-sex marriage is a constitutional right under the 14th Amendment to the Constitution, thereby making same-sex marriage legal throughout the United States. All in eleven years!

Remember that it all started here in Massachusetts. "Something that I never expected in MY lifetime."

Transgender Equality Status: For an up-to-date [05/04/16] status of the Transgender Rights in Massachusetts please go to: news.wgbh.org/2016/05/04/politics-government/transgender-rights-fierce-imperative-now

Transgender Rights is the current hurdle that we have to overcome.

Pride Marches

Boston: Every year for the past seventeen years, our church has gone into Boston to celebrate Boston Pride. And we will again march this year on the second Saturday in June: June 11, 2016. Individual members have been celebrating and marching for much longer than that.

The Boston Pride Vision Statement: Solidarity through Pride, recognizes the intersectionality of identities within our very diverse community and the call for solidarity and support among all parts of our community.

This year commemorates Boston Pride's 46th year of existence: Boston Pride, as an organization, was born in 1970, one year after the Stonewall Riots. From a small march with speeches between Jacque's Cabaret and City Hall, to over 40 events including a four-hour parade.

UUCM will again be participating in the Arlington Street Church's Pride Service on Saturday June 11th at 11am, and then we will march with the Congregations that are part of the UUA Mass Bay/Clara Barton District.

Please see Bill Smalley or Holly Jaynes for more information about the March – hope you can join us.

Pride in Salem: The fifth annual North Shore Pride Parade and Festival will take place Saturday, June 25, 2016, in Salem, MA. The theme of this year's celebration is Building Community with Pride

The Parade starts at the Salem Post Office and ends up at the Salem Commons. We have marched for the past four years, since the beginning. A proud showing of Pride on the North Shore. Come join us.

Community Interfaith Pride Service: Join together on Friday evening, June 24, 2016 at 7:00pm for an Interfaith Pride Service at Tabernacle Congregational Church in Salem. All are welcome!

Happy Pride to all.

For the Welcoming Congregation, Bill Smalley & Holly Jaynes

REPORT FROM THE STETSON ART GALLERY

Our Church's Art Gallery continues to attract exhibits by artists throughout the North Shore, including Church members and friends. This year, in a departure from our past experience, we hung two special exhibits in addition to our usual exhibits by solo artists. Due to a request from Irene Praeger and Rev. Wendy, in September and October, we featured a traveling exhibit of photos and text entitled "Love Makes a Family," which was put together by the Family Diversity Project. The exhibit featured the stories of GLBT families, which in many cases were very moving. The response to the exhibit was highly positive. Since the exhibit requires a fee, we held a special extra collection which raised \$300 toward the fee. The curators contributed \$200 to cover the cost of shipping.

In March and April, Stetson Gallery featured an exhibit centered on the history of UUCM, featuring photos and text by Mike Gery and layout by Anthony Silva. This exhibit was on display as part of the tricentennial celebration of the church. During January and February, member photos of the church were displayed.

In November, the Gallery featured 50 12x12 paintings of Seagrass by Boston artist Nedret Andre. The exhibit proved very popular, and Nedret donated a painting to be included in a special Gift Basket that was raffled off as part of the Red Bow Fair. Our dear late friend Gary Griffiths won the basket.

The May exhibit featured the watercolors of Tewksbury artist Mary Gilbert Remillong. In addition to the usual opening reception, the Gallery took part in the Marblehead Art Walk on the weekend of May 14 & 15. We considered our participation a success, and will take part again in 2017.

The June exhibit, entitled "Circle of Friends," has been organized by Holly Jaynes, who has organized Stetson Gallery exhibits honoring GLBT Pride month in the past. We appreciate Holly's efforts in coordinating the exhibit while we are away for a few weeks. We hope to re-establish this tradition in the Gallery each year, and next year plan to be available to assist Holly!

The 2016-2017 Stetson Gallery season is now booked, with the exception of January 2017, which we have decided to leave open unless a UUCM member or friend is very interested in an exhibit. Artists scheduled are: September, Nedret Andre, returning with a larger format series of Seagrass paintings; October, Hope Carpenter; November, Catherine Dullea; February, John Fogle; March, Susan J. Schrader; April, Marie Buckley; May, North of Boston Artists, a collaborative of several watercolor painters; and June, once again honoring GLBT Pride month.

After four full years curating Stetson Gallery, we are delighted with the quality of the work exhibited and the reception the Gallery has received from artists, visitors, and Church members. Stetson Gallery offers our Church another way to present itself to the public as a welcome location for all, and especially as a place where artistic expression is encouraged.

We welcome requests from Church members and friends to stage an exhibit in Stetson. We hold exhibits September through November and February through June.

We continue to divide our duties: Jo Ann contacts and communicates with artists, sets the schedule, and writes and distributes PR. Anthony hangs each exhibit with the artists, who are enthusiastic in their appreciation for Anthony's help and guidance.

Each artist holds an Opening Reception, usually noon-2 p.m. on the first Sunday of the month. Several have attended Friday night concerts at the me&thee coffeehouse to be available to discuss their work.

Publicity has been effective in the local media, where photos of the artwork are featured prominently, and on social media. This year, we inaugurated a Stetson Gallery Facebook page, which has proven very effective, and we continue to utilize the UUCM and All Marblehead, as well as the curators's own, Facebook pages. Artists who are proactive about sending out their own invitations draw larger attendance at the openings, and seem to sell more work: we ask artists to contribute 10% of their sales to the Church.

Publicity emphasizes the hours that the Gallery is open, saying that "if the lights are on and the Gallery doors are open," visitors are welcome to view the exhibit. In addition, our Church Administrator, Christina Aubin, makes herself available for special appointments if they fit her work schedule, and we list the curators' email address, stetson@uumarblehead.org, for people to contact us for a special viewing.

Artists interested in exhibiting in Stetson Gallery should contact the curators at Stetson@uumarblehead.org.

R. Anthony and Jo Ann Augeri Silva

REPORT FROM SUNDAY SEMINAR

We have met every Sunday at 9:00 from September into June. Generally there are about 14 members with a high of 25, bursting the seams of the Nichols room, and a low of seven. We began with Paul Travis on GMOs and what they do to our bodies, then a few weeks on Brian Swimme's cosmology, Mike Gery on the early history of our church. Among the many other contributions that filled out the year, Michael Sebastian presented his work in Laos with monks and homeless children and Gordie Corzine, our resident scientist, filled us in on current theories of the origin of the universe.

Our format is a half hour presentation, room for discussion and questions, and then each of us has an opportunity to share ideas at the end.

Respectfully, Jack Weltner

REPORT FROM THE TRICENTENNIAL STEERING COMMITTEE

Our congregation began 300 years ago under the guidance of Rev. Edward Holyoke. His liberal leadership was followed by Rev. John Bartlett, who took us into Unitarianism, and Rev. Bob Hill, who brought us into modern liberalism, and Rev. Wendy Von Courter, a humanist leader.

We began our celebration in 2016 with the establishment of a Visioning Team that, with the guidance of Rev. Wendy, developed a vision of the future that was approved by the congregation. The vision states:

We are a vibrant community where people of all ages and life experiences feel connected, inspired, and engaged. We invest in the potential of UUCM to transform our community and our world toward more love, justice, and peace. We build our community as a center for spiritual exploration, social justice, and intellectual engagement, and maintain our reputation as a welcoming community.

The vision included areas of focus, many of which have been addressed and others are in process at this writing

We installed a video kiosk in the hallway to provide information about our church, history, and upcoming events to everyone, including visitors.

Also in the spring, a new program of public events called The Meetinghouse Series - talks by prominent guest speakers about topical subjects and other performances - was initiated. A number of talks about Marblehead and our history - and a tale of our own history by famed storyteller Judith Black - have been presented so far. We hope this series will be ongoing.

In 1996 at the 275th anniversary, a time capsule placed in the cornerstone in 1911 (when the current building was constructed) was opened, with Rev. Charles Wilson presiding. It turned out to be ruined by water. A new time capsule with artifacts from 1996 was placed in the cornerstone.

In the fall of 2015, the time capsule was opened, again with Rev. Wilson - now Emeritus - presiding. This time all was fine. New material was added and the cornerstone replaced for some future generation to examine.

More than 80 persons submitted recipes to create a Tricentennial Cookbook. With 129 pages of delicious recipes for all manner of dishes, the book contains a cross section of cuisine from Oobleck to Bulldog Tofu. A must for every kitchen. (Copies still available). Other memorabilia includes baseball caps, tote bags, bumper stickers, Hestia plaques, and cards. Many of these are intended to be used in public to let all know of our celebration.

A special lunch was held during which members added events and memories to a 300 year timeline creating a story not only of what has happened, but who we are and what we care about.

On April 3, a Gala Celebration was held. Invited guests included Marblehead clergy, neighboring UU clergy, town and state officials, and others. As part of the event, the Marblehead Interfaith Covenant, which is transferred from one congregation to another each year, was transferred to us. The Gala concluded with a reception to which all were invited.

The UUCM choir, under the direction of Music Director Karen Gahagan, presented a special program of music that was enthusiastically received.

Beginning well before the Tricentennial year and continuing through this year, Mike Gery has been writing a detailed and scholarly book describing the evolution of our liberal congregation. Although not completed at the time of this writing, it is highly anticipated.

The committee thanks the many members who made this year and a half celebration possible. While we cannot name everyone, the following had major roles:

Meetinghouse Series: Jay Morrison, Chair

Gala Ceremony: Cindy Moore and Robin Ronchi Co-Chairs

UUCM choir: Karen Gahagan, Music Director Charles Wilson, Minister Emeritus The Visioning Team: Susie LaBrie, Nikki Moore, Mark Wilhelm, Betsy Albee, Dana McKinnon-Tucker, Steve Krom, Mary Gardner, and Rev. Wendy von Courter

History Book Author: Mike Gery

And special thanks to Rev. Wendy for her many contributions, and especially for planning and conducting the Gala.

Finally, as chair, I thank Mary Gardner, Hazel Grenham, and Bill Smalley, for their dedication and contributions to the success of the Tricentennial celebration.

Hugh Stewart

Unitarian Universalist Church
Balance Sheet
As of May 31, 2016

	<u>May 31, 16</u>
ASSETS	
Current Assets	
Checking/Savings	
1005 · UUC Hamlin Turner Memorial Fund	3,187.26
1010 · UUC Story Fund UUCM	24,336.70
1015 · UUC Silver Trust	18,245.60
1020 · UUC Pay Pal Account UUCM	390.46
1025 · UUC Conway Fund UUCM	264.51
1030 · UUC Memorial Garden Fund UUCM	6,371.43
1035 · UUCM Building Fund	10,142.95
1040 · Me and Thee Coffee House	16,505.03
1045 · UUC Marblehead Bartlett Trst	24,353.49
1050 · Ferry Beach Account	6,129.97
1120 · NGB 6Month CD	50,083.12
9999999 · National Grand Bank Checking	
NGB Sweep account	6,703.88
9999999 · National Grand Bank Checking - Other	11,897.52
Total 9999999 · National Grand Bank Checking	<u>18,601.40</u>
Total Checking/Savings	178,611.92
Accounts Receivable	
1200 · Pledge Receivable	51,664.60
Total Accounts Receivable	<u>51,664.60</u>
Other Current Assets	
1499 · Undeposited Funds	385.00
1600 · Prepaid expense	704.00
Total Other Current Assets	<u>1,089.00</u>
Total Current Assets	231,365.52
Other Assets	
1800 · UBS INVESTMENT	63,943.69
1900 · Silver Trust Investments	1,101,419.89
Total Other Assets	<u>1,165,363.58</u>
TOTAL ASSETS	<u>1,396,729.10</u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2000 · Accounts Payable	13.00
Total Accounts Payable	<u>13.00</u>
Other Current Liabilities	

Unitarian Universalist Church
Balance Sheet
As of May 31, 2016

	May 31, 16
Payroll Liabilities	
Employee FICA	-290.30
Employee Medicare	-25.63
Federal Withholding	-487.40
State Withholding	-638.84
Payroll Liabilities - Other	20.05
Total Payroll Liabilities	-1,422.12
2050 · Natl. Grand Bank Reserve LOC	12,599.12
2100 · *Payroll Liabilities	16,016.86
2400 · Due to account	30.00
2405 · Hamlin Turner Memorial Fund	3,187.26
2410 · Story Fund UUCM	13,336.73
2415 · Silver Trust	23,612.73
2420 · Pay Pal Acct	387.41
2425 · Conway Fund	264.51
2430 · Memorial Garden Fund	6,653.43
2435 · Building Fund	10,142.95
2440 · Me and Thee Coffee House Fd	16,505.03
2445 · Marblehead Bartlett Trst	25,193.49
2450 · Ferry Beach Fund	8,286.93
Total Other Current Liabilities	134,794.33
Total Current Liabilities	134,807.33
Long Term Liabilities	
Consumer Loan #42892	32,872.44
3100 · Mortgage (Principal)	75,583.99
Total Long Term Liabilities	108,456.43
Total Liabilities	243,263.76
Equity	
Opening Bal Equity	6,200.86
Retained Earnings	-84,318.00
3180 · UUCM Endowment UBS	63,301.44
3190 · Silver Trust Funds	1,105,546.00
Net Income	62,735.04
Total Equity	1,153,465.34
TOTAL LIABILITIES & EQUITY	1,396,729.10

Unitarian Universalist Church of Marblehead

OPERATING ACCOUNT SUMMARY Fiscal Year 2015 - 2016 (June-May)

Printed: June 7, 2016

REVENUE	Year to Date (beginning June 2015)			FY 2017 Budget
	Actual	Budget	Variance	
DEPOSITS TO BE ALLOCATED	\$0		\$0	
4100 - COLLECTION PLATE	13,505	13,000	505	12,000
4200 - DONATIONS	6,447	5,550	897	5,614
4300 - FUNDRAISING	23,382	25,350	(1,968)	25,350
4400 - ENDOWMENT INCOME	22,183	25,050	(2,867)	26,050
4500 - MISCELLANEOUS INCOME	2,113	0	2,113	0
4600 - PLEDGE PAYMENTS				
4608 - Past Year	28,836	6,122	22,714	0
4609 - Current Year	159,061	146,992	12,069	149,121
TOTAL PLEDGE	187,897	153,114	34,783	149,121
4700 - RENTALS & CHURCH USES	12,658	17,350	(4,692)	18,350
4800 - OPERATING ACCOUNT INTEREST	0	0	0	0
TOTAL REVENUE	\$268,185	\$239,414	\$28,771	\$236,485

OPERATING EXPENSES	Year to Date (beginning June 2015)			FY 2009 Budget
	Actual	Budget	Variance	
EXPENSES TO BE ALLOCATED	\$0	\$0	\$0	
6100 - ADMINISTRATOR PACKAGE	24,353	24,310	43	25,137
6200 - DRE PACKAGE	11,659	23,566	(11,907)	16,962
6300 - BUILDING & GROUNDS	20,713	25,600	(4,887)	25,600
6400 - CHILDREN & YOUTH PROGRAM	882	2,500	(1,618)	1,500
6500 - CHURCH-SUPPORTED ORGANIZATIONS	0	225	(225)	170
6600 - LEADERSHIP FORUM (COMMITTEES)	152	0	152	0
6700 - PRINCIPAL & INTEREST	17,214	10,811	6,403	10,811
6800 - MINISTER PACKAGE	86,750	86,530	220	87,493
6900 - OTHER UUCM PROGRAMS	6,207	4,050	2,157	3,850
7000 - MUSIC PROGRAM	14,327	14,580	(253)	14,835.00
7100 - OFFICE & OPERATIONS	12,090	9,475	2,615	9,595
7300 - PAYROLL TAXES (FICA/MEDICARE)	10,417	7,258	3,159	12,000
7400 - SEXTON	17,104	17,289	(185)	17,631
7700 - UTILITIES	7,513	12,600	(5,087)	10,400
7800 - WORSHIP SERVICES	35	500	(465)	500
TOTAL EXPENSES	\$229,418	\$239,294	(\$9,876)	\$236,484

NET OPERATING INCOME	\$38,767	\$0	\$38,767	\$1
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Unitarian Universalist Church of Marblehead

OPERATING ACCOUNT DETAIL Fiscal Year 2015 - 2016 (June-May)

Printed: June 7, 2016

REVENUE	Year to Date (beginning June 2015)			FY 2017 Budget
	Actual	Budget	Variance	
DEPOSITS TO BE ALLOCATED	\$0		\$0	
4100 - COLLECTION PLATE	13,505	13,000	505	12,000
4200 - DONATIONS				
4201 - In Memoriam	1,060	350	710	350
4202 - National Grand Bank	750	4,000	(3,250)	4,000
4203 - Non-specific Gifts	4,637	1,200	3,437	1,264
TOTAL DONATIONS	6,447	5,550	897	5,614
4300 - FUNDRAISING				
4301 - Auction (net of expenses)	13,295	12,000	1,295	12,000
4302 - Bookstall	63	100	(37)	100
4304 - Other Events	1,499	5,250	(3,751)	5,250
4305 - Red Bow Fair (net of expenses)	8,525	8,000	525	8,000
TOTAL FUNDRAISING	23,382	25,350	(1,968)	25,350
4400 - ENDOWMENT INCOME				
4401 - CD at National Grand Bank	54	50	4	50
4402 - NGB Stock	12,625	5,000	7,625	6,000
4404 - UBS Account	1,889	2,000	(111)	2,000
4405 - Silver Trust	5,916	15,000	(9,084)	15,000
4406 - Bartlett Fund	1,700	3,000	(1,300)	3,000
TOTAL ENDOWMENT INCOME	22,183	25,050	(2,867)	26,050
4500 - MISCELLANEOUS INCOME	2,113	0	2,113	0
4600 - PLEDGE PAYMENTS				
4608 - Past Year	28,836	6,122	22,714	0
4609 - Current Year	159,061	146,992	12,069	149,121
TOTAL PLEDGE	187,897	153,114	34,783	149,121
4700 - RENTALS & CHURCH USES				
4701 - AA (Sat)	\$755	\$1,000	(\$245)	\$1,000
4702 - AA (Tues)	984	1,350	(366)	1,350
4703 - Jazz Associates	0	0	0	0
4704 - me & thee	2,000	4,000	(2,000)	5,000
4705 - Other Rental Fees	0	1,000	(1,000)	1,000
4706 - Weddings/Funerals	4,080	4,000	80	4,000
4708 - Music Together	2,432	3,000	(568)	3,000
4709 - One Small Voice (AA)	2,407	3,000	(593)	3,000
TOTAL RENTALS	12,658	17,350	(4,692)	18,350
4800 - OPERATING ACCOUNT INTEREST	0	0	0	0
TOTAL REVENUE	\$268,185	\$239,414	\$28,771	\$236,485

Unitarian Universalist Church of Marblehead

OPERATING ACCOUNT DETAIL Fiscal Year 2015 - 2016 (June-May)

Printed: June 7, 2016

OPERATING EXPENSES (continued)	Year to Date (beginning June 2015)			FY 2009 Budget
	Actual	Budget	Variance	
6700 - PRINCIPAL & INTEREST				
6701 - Mortgage Interest	\$3,315	\$3,250	\$65	\$3,250
6702 - Natl. Grand Bank Overdraft Loan	698	50	648	50
6703 - Secured Line of Credit Interest	0	300	(300)	300
6704 - Secured Line of Credit Principal	0	0		0
6705 - Mortgage Principal	3,408	2,744		2,744
6706 - Roof Loan Interest	2,258	1,350	908	1,350
6707 - Roof Loan Principal	7,536	3,117	4,419	3,117
TOTAL PRINCIPAL & INTEREST	17,214	10,811	6,403	10,811
6800 - MINISTER PACKAGE				
6801 - Gross Payroll	39,959	40,000	(41)	40,800
6802 - Housing	32,155	31,000	1,155	31,000
6803 - Disability	686	810	(124)	810
6804 - Pension	7,423	8,151	(728)	8,314
6805 - Professional Expenses	6,000	6,000	0	6,000
6806 - Health Insurance	0	0	0	0
6807 - Life Insurance	527	569	(42)	569
6808 - Dental Insurance	0	0	0	0
TOTAL MINISTER PACKAGE	86,750	86,530	220	87,493
6900 - OTHER UUCM PROGRAMS				
6906 - Trustees' Discretionary Expenses	1,356	200	1,156	200
6909 - Minister's Discretionary Expenses	1,050	200	850	0
6910 - Stewardship (Every Member Canvass)	0	500	(500)	500
6911 - Hospitality (net of donations)	281	100	181	100
6912 - Membership	0	50	(50)	50
6915 - Nursery Expenses & Staff (RE Teacher)	700	1,200	(500)	1,200
6916 - Nursery Supervisor & Staff	2,820	1,800	1,020	1,800
TOTAL OTHER UUCM PROGRAMS	6,207	4,050	2,157	3,850
7000 - MUSIC PROGRAM				
7001 - Guest Musicians	500	625	(125)	600
7003 - Music Director	7,982	8,000	(19)	8,160
7004 - Pianist/Organist	5,450	5,300	150	5,450
7005 - Piano & Organ Tuning	200	330	(130)	300
7006 - Program and Rehearsal Supplies	195	250	(55)	225
7007 - Summer Music	0	0	0	0
7008 - Professional Development	0	75	(75)	100
TOTAL MUSIC PROGRAM	14,327	14,580	(253)	14,835

Unitarian Universalist Church of Marblehead

OPERATING ACCOUNT DETAIL Fiscal Year 2015 - 2016 (June-May)

Printed: June 7, 2016

OPERATING EXPENSES (continued)	Year to Date (beginning June 2015)			FY 2009 Budget
	Actual	Budget	Variance	
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6704 - Secured Line of Credit Principal	0	0		0
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6807 - Life Insurance	527	569	(42)	569
6808 - Dental Insurance	0	0	0	0
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7006 - Program and Rehearsal Supplies	195	250	(55)	225
7007 - Summer Music	0	0	0	0
7008 - Professional Development	0	75	(75)	100
TOTAL MUSIC PROGRAM	14,327	14,580	(253)	14,835

Unitarian Universalist Church of Marblehead

OPERATING ACCOUNT DETAIL Fiscal Year 2015 - 2016 (June-May)

Printed: June 7, 2016

OPERATING EXPENSES (continued)	Year to Date (beginning June 2015)			FY 2009 Budget
	Actual	Budget	Variance	
7100 - OFFICE & OPERATIONS				
7101 - Bank Service Charges	\$1,518	\$150	\$1,368	\$150
7103 - Duplication/Copier	2,720	2,500	220	2,500
7104 - Internet Service & Telephone	2,164	2,000	164	2,000
7105 - Software & Licensing	750	950	(200)	1,070
7106 - Office Supplies	1,340	1,200	140	1,200
7107 - Postage	538	200	338	200
7108 - Recruiting & Advertising	127	0	127	0
7111 - Workers' Comp Insur (anticipatedpymt amt)	1,750	1,750	0	1,750
7113 - Payroll Service	1,184	725	459	725
TOTAL OFFICE & OPERATIONS	12,090	9,475	2,615	9,595
7300 - PAYROLL TAXES (FICA/MEDICARE)	10,417	7,258	3,159	12,000
7400 - SEXTON				
7401 - Gross Payroll	16,944	17,100	(156)	17,442
7402 - Disability	159	189	(30)	189
TOTAL SEXTON PACKAGE	17,104	17,289	(185)	17,631
7700 - UTILITIES				
7701 - Electric	1,793	2,200	(407)	2,000
7702 - Gas	4,721	9,000	(4,279)	7,000
7703 - Water & Sewer	1,000	1,400	(400)	1,400
TOTAL UTILITIES & SERVICES	7,513	12,600	(5,087)	10,400
7800 - WORSHIP SERVICES				
7801 - Flowers	(59)	0	(59)	0
7804 - Guest Ministers	0	250	(250)	250
7805 - Supplies, Decorations & Hymnals	73	250	(177)	250
7805 - Worship Other	21	0	21	0
TOTAL WORSHIP SERVICES	35	500	(465)	500
TOTAL EXPENSES	\$229,418	\$239,294	(\$9,876)	\$236,484
NET OPERATING INCOME	\$38,767	\$0	\$38,767	\$1