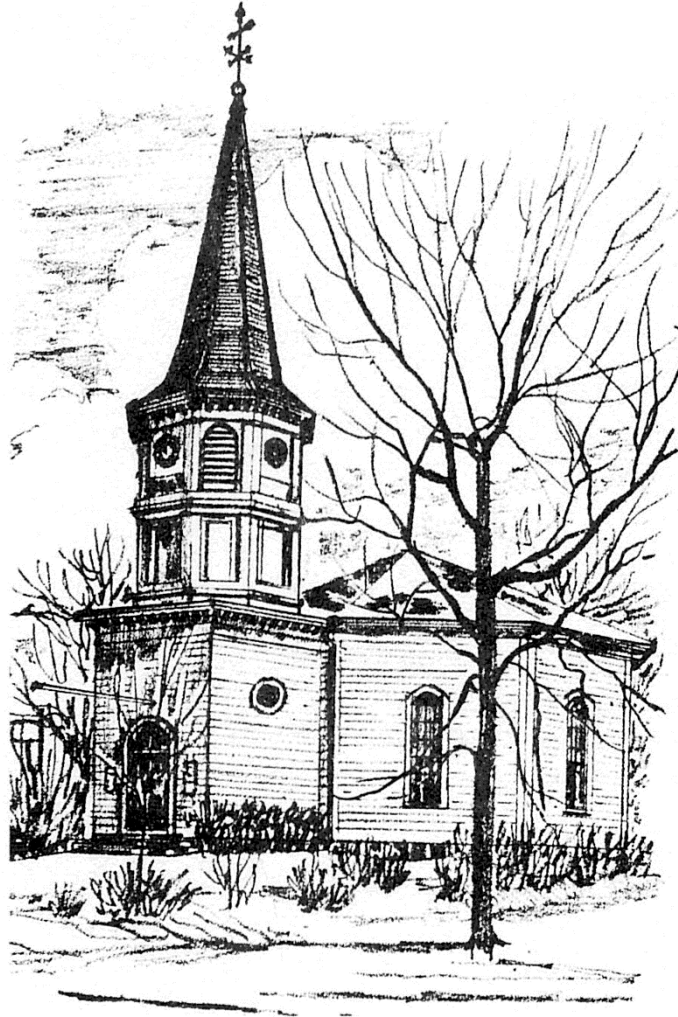


FOLLEN CHURCH SOCIETY
UNITARIAN UNIVERSALIST
755 Massachusetts Avenue, Lexington MA 02420

2014 ANNUAL REPORT



You are cordially invited to the
FOLLEN CHURCH SOCIETY 2014 ANNUAL MEETING
THURSDAY, MAY 15, 2014 AT 7:30 p.m.
in the Community Center, Follen Church

All members and friends of Follen are welcome at and urged to attend the Annual Meeting; however, only members of the Society may vote.

**PLEASE BRING THIS COPY OF THE ANNUAL REPORT
WITH YOU TO THE MEETING**

WARRANT FOR THE 2014 ANNUAL MEETING OF THE FOLLEN CHURCH SOCIETY

**To the members of the Follen Church Society:
You are requested to assemble in the Community Center of the Follen Church,
755 Massachusetts Avenue, Lexington MA, at 7:30 p.m. on Thursday, May 15, 2014**

ARTICLE I To receive and act on the report of the Parish Minister.

ARTICLE II To receive and act on the reports of the Officers, Staff, Trustees, Auditor and Action Teams.

ARTICLE III To act on the report of the Nominating Committee and to elect the required Program Council members, Parish Board members, Nominating Committee members, Trustees and Auditor for the coming fiscal year beginning July 1, 2014.

ARTICLE IV To receive and act on the Annual Plan and Budget.

ARTICLE V To elect delegates to the UU General Assembly in Providence, Rhode Island, June 25-29, 2014.

ARTICLE VI To ensure we allow sufficient time for consultation with Action Teams and others, and for broad congregational fact-finding and discussion -- especially regarding but not limited to Follen's response over the next several years to the climate-change challenge -- the new Long-Term Strategic Plan will be developed, discussed and voted upon during the 2014-15 church year.

ARTICLE VII To transact any other business that may properly come before the Society.

By the Program Council Secretary, Harriet Peterson

Note 1: Qualifications to vote: According to the By-laws, a member may vote if he or she has been a member for at least 30 days before the meeting. For this Annual Meeting, that would mean by April 15, 2014.

Note 2: How to vote by proxy: The By-laws state that any voting member whose attendance at any meeting is inhibited may deposit a written proxy authorizing one or more members to vote on any or all warrant articles with the-Secretary or Program Council President prior to the meeting. A proxy form is available from the Church Administrator.

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Follen Church Society

Membership Information

(May 1, 2013 – April 30, 2014)



New Members

Catherine Collins	June 16, 2013
Erin Malone	September 19, 2013
Howard Bernstein	March 6, 2014
Dawn Ridge	April 6, 2014
Jacqueline W. Buckley	April 6, 2014
Amy May Yee	April 6, 2014
Sarah Jackson	April 6, 2014
Elisabeth W. Taylor	April 6, 2014
Aimee Fox	April 6, 2014
Matthew Fox	April 6, 2014
Jennifer Logan	April 6, 2014
Lisa McIlrath	April 6, 2014
Patrick Botti	April 6, 2014
Jane Bausch	April 6, 2014
Jen Vandiver	April 6, 2014
Jamie Leutz	April 6, 2014
Maureen Mulhern	April 6, 2014
Dominique Vo	April 6, 2014
Courtney Jones	April 6, 2014
Lynx Mitchell	April 6, 2014
Pam Mitchell	April 6, 2014
Sophia Morgan	April 13, 2014

Child Dedication

Saleste Carolyn Jones	Dedicated December 22, 2013
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Deaths of Follen Members and Friends

Don Chipman	June 13, 2013
Norman Hayes	July 9, 2013
Mecca Carpenter	August 4, 2013
Robert Duncan	October 21, 2013
Edward Apgar	March 31, 2014

Active Members: As of April 30, 2014 there were 305 active members.

Follen Church Society

Vision

We are a welcoming Unitarian Universalist congregation.
Nourished by our community, we grow spiritually and embrace the world.

Mission

Reach out and welcome all, experiencing difference as opportunity;

*Pursue our spiritual paths independently and in fellowship, sharing our quest
for understanding, wonder, and meaning;*

*Commit ourselves to justice, service, and increased harmony with nature through
thoughtful, compassionate, and courageous action;*

*Give generously of our time, talents and resources at Follen and beyond,
energized by our contributions and grateful for those of others.*

MINISTER AND STAFF REPORTS

MINISTER

Claire Feingold Thoryn

Dear members and friends of Follen Community Church,

Many ministers come to the end of their church year feeling tired and burned-out. I don't feel that at all: I feel excited, energized, and joyful. And I owe that to you: your culture of confident, engaged lay-leadership means that every step of the way we share the ministry of this congregation. I know that you care about the spiritual, social, and organizational life of this community, because you show me your care with your presence: in worship, at meetings, in my email inbox, in pledges, and on the phone. In worship I feel your deep engagement with the holy, your willingness to listen with openness and love, your authentic ability to laugh and cry, your desire for personal and spiritual transformation. And you have consistently encouraged the way I balance the many demands within the congregation with my own family and spiritual life. Truly it is an incredible honor and great delight to serve this community. Thank you for a year that was a blessing beyond anything I could have imagined.

One particular joy I would like to hold up in this report is the hardworking, thoughtful, smart and kind staff here at Follen. During the interim years, before I arrived, Follen transitioned to the minister being the head of staff. This year I worked on increasing my skills in that area, including taking a training on staff supervision in congregations. I am filled with gratitude to work on this growing edge with such a superb, trustworthy, and talented staff. If I held up the particular gifts of each staff member this report would go on for many pages; suffice to say, it doesn't get much better than this.

Next year our Annual Plan for the congregation holds this primary goal: "Our overriding objective is to harness this community's many strengths to promote continued personal and spiritual growth for everyone at Follen." This goal will be mine as well, and I look forward to our continuing our shared ministry together.

In faith, hope, and love,
Rev. Claire Feingold Thoryn

DIRECTOR OF LIFESPAN RELIGIOUS EDUCATION

Debra Zagaeski

What a wonderful year for the Follen Church community. We have all welcomed a grounded and gracious spirit in the new settled minister, Claire Feingold Thoryn. I have enjoyed getting to know Claire and to work with her on a variety of Follen worship services, programs and plans. Claire has so much to offer and I appreciate her depth of knowledge and her spirit. I look forward to working with her in the year to come.

I am privileged to work with the fine and dedicated Follen staff. I am ever grateful to them all for their time, talents and support all through the year.

At the end of this Church year the entire Follen community will be sad to say farewell to Tasha Bonfanti Balsom. We have all appreciated Tasha's beautiful spirit and dedication as she has offered welcoming arms to greet the youngest members and visitors to the Follen community each Sunday morning for the past nine years.

I am also grateful for the time, energy and wisdom of the members of the Religious Education Action Team. Throughout the year the REAT and I review, plan and consider all things to do with the religious education programming at Follen. The REAT is a wonderful group of individuals who bring a great depth of experience to the table. I am so honored to work with all of them. The members of the REAT this year: Tara Fleming Caruso and Leslie Stebbins (co-chairs), Ann Bobo, Cindy Carver, Ginna Johnson, Janet Lane, Jack Lloyd, Andrea Paquette, and Sally Richter.

This year the REAT and I have piloted several programs in religious education. We offered a 4-week teaching rotation for Sunday morning classroom volunteers. We offered a film based discussion curriculum for the first time in the grade 7/8 class. And we continued many of the programs and curriculum that are the corner stones of our Follen Sunday morning programming. The REAT and I have also started to form sub-groups to work on specific areas of the Lifespan Religious Education programs.

The collaboration between First Parish Lexington and Follen continues in the grade eight "Our

Whole Lives" Program. This year there were twenty-three participants with facilitators: Alison Streit Baron, Alison Greene, Megan Lancaster, and Larry Roop.

This year the Coming of Age class has nine youth participants and nine adult mentors. We are looking forward to the worship service on June first.

The April multigenerational trip to New Orleans was a grand success with 33 participants. The group participated in an engaging dialogue on race and class which we will continue here at home.

The youth of FUUY have enjoyed a vibrant year with greater numbers of youth attending. We are grateful to this year's volunteer youth advisors: Howie Bernstein, Andy Dixon, and Greg Shenstone. Emma Puka-Beals has served as our paid youth coordinator for the past two years and will step down at the end of this Church year. The youth had several conversations this year that were led by members of Boston Mobilization. We hope to continue these dialogues in the coming year.

I look forward to the year ahead!

In Faith, Debra

MUSIC DIRECTOR

Thomas Stumpf

The music program at Follen continues to thrive. The first year of collaboration with the Rev. Claire has been an extraordinarily fruitful as well as joyful one. We meet on an almost weekly basis to discuss services and to ensure that the music is integrated into the whole. Her enthusiasm, her generosity of spirit and her wisdom have been inspiring to me. I am also always grateful for Debra's patience and encouragement and friendship, and for the extraordinary kindness and helpfulness that Sarah and Cindy show me.

The Senior Choir continues to be central to Follen's music program; they enrich most Sunday services with their beautiful singing; they work hard and long hours to bring us all great joy; they form a delightful community that is a kind of covenant group, but they also interact with and are a part of the Follen community in many other ways. I am full of admiration and gratitude for

each and every one of them - I hope you let them know that you are too!

As always, our professional soloists/section leaders have continued to contribute heart-felt singing to many services and to lead their sections with patience and love. Soprano Epp Sonin has been with us for many, many years, but her voice has not lost its youthful bloom. Her solo contributions as well as her leadership of the soprano section are a constant joy. Tenor Scott Hilse has been with us for many years too, and his passionate music-making has never flagged. In addition he has made some exquisite contributions to our repertoire with his compositions. He plans to retire from his position at Follen at the end of this church year: to say that he will be missed is an understatement. Baritone Benjamin Sears is yet another singer with a long association with Follen: the maturity of his artistry shows in all that he does. Mezzo-soprano Caitlin Felsman's singing is marked by a committed professionalism and a highly imaginative musical sensitivity. I am as always deeply grateful to our pianist, Shaylor Lindsay, who is both a wonderful collaborative pianist and a delightful human being!

Through the hard work of all these musicians the standard of music-making has continued at an extraordinarily high level. This year a central theme to the music was works written in the last 100 years. The music service in December was devoted to a revised and enlarged version of my Christmas cantata "In this night" which was performed with consummate skill by choir, soloists and a superb ad hoc chamber orchestra. The Palm Sunday music service centered around the theme of Nature in works by Arvo Pärt, Randall Thompson, Greg Brown, Vaughan Williams as well as Scott and myself. A very difficult program, but the singers met the challenge with great skill and courage, and truly sang their hearts out to create a deeply moving service - rounded out by some wonderful texts, chosen and read by Claire.

The Youth Choir continues to inspire me in myriad ways. The kids stream in every Monday afternoon, eat and drink and make merry with each other and then rehearse with exemplary energy and skill. Their singing at services has never been less than excellent!! - Another regular highlight of the church year: the Christmas Eve service featuring alumni/ae and High School Seniors of the Youth Choir. The number of singers who showed up this year broke even last year's record, and as always

the singing was both inspired and inspiring. The joyful reunion of many old friends makes this a particularly moving experience for all of us. - Talking about record numbers: a total of 76 kids is expected to be performing in the operetta this year.

The Junior Choir continues to delight us with their exuberant singing under the inspired leadership of Holly Stumpf. She leads her weekly rehearsals with a gentle firmness and an enthusiastic musicality that are exemplary. Her work steadily improves the Junior Choir's contribution to the operetta and of course feeds into the excellence of the Youth Choir! She has had a wonderful accompanist in Julian Dong, a new addition to our program!

Operetta season has of course started, and the Youth and Junior Choirs are hard at work on "Yeomen of the Guard." Judging by the recent first run-through, it will be a fabulous production! Special thanks to Eric Mazonson, who will once again be our Gilbert and Sullivan pianist. Holly helps me immensely with the enormous task of overseeing the whole G&S production - and she and I would like to thank all the many volunteers who make the choir program run smoothly and efficiently: those who help with robes, bring snacks, send out letters, buy doughnuts, help on Sunday mornings, etc. A big thank you also to all those who have already started working so very hard on the innumerable jobs involved in creating the operetta. Sets and costumes are taking shape, and I am certain they will be nothing less than magnificent!

Love to you all,
Thomas

JUNIOR CHOIR DIRECTOR **Holly Stumpf**

The Junior Choir was a wonderfully large and enthusiastic group again this year. The singers have learned songs quickly and have shown commitment as well as musicality. Our repertoire has included the usual variety—from an African-American spiritual to Bach to a Gospel song to the Hallelujah Chorus to an Alleluia for Easter. It has been a pleasure to sing a benediction response with the Youth Choir at each service and to sing with the Senior Choir and Youth Choir on Thanksgiving and Easter. Junior Choir members are excited about the operetta as we

puzzle over the crazy plot and silly words. We are fortunate to have Julian Dong as our new pianist. His faithful and supportive presence at all rehearsals is appreciated by all of us.

Together with the Youth Choir, we thank all the many volunteers who make the choir program possible! We certainly appreciate those Monday snacks and Sunday donuts—and a robe ready whenever we sing! We are thankful for all the parents who are already working very hard to make the operetta a success. We are especially aware of the costume people, who have one of the largest tasks and whose presence at rehearsal time has already raised the excitement level about "Yeomen"!

Love,
Holly Stumpf

ADMINISTRATIVE TEAM **Sarah Garner**

The joy, energy and optimism that have characterized the first year of Rev. Claire Feingold Thoryn's ministry have carried through to Cindy Gallagher, Jimmy McFeeley and me as we work behind the scenes, and we feel as buoyant as the Follen congregation. This has been an exhilarating year for everyone associated with Follen!

Cindy and I got new computers and software in January and these improved tools have helped us to do Follen's work effectively. We appreciate the hours that Richard Papazian and John Griffith spent to make it all happen, and we are especially grateful for Rich's foresight to make sure we were upgraded before the phase-out of the operating system we had been using for the past decade.

Jimmy got some new equipment this year as well. The B&G team purchased a more powerful snow blower to help make a challenging task at least somewhat easier. Even better for Jimmy would be if the snow storms could be scheduled for idle times at Follen rather than the Saturday-to-Sunday overnight slot when the pressure is on to clear for Sunday morning, but that's out of BGAT's control.

2013-14 has been full of activity. We thought the pace might relax after the two big events of the fall – the East Village Fair and Rev. Claire's

installation -- but somehow this place has stayed busier than ever. At least 50 Follen groups have met this year: action teams, subcommittees and task forces; governing bodies; two support groups; two youth groups; adult, youth and junior choirs; adult programs including Sacred Dance, Soul Collage, two book groups and the Follen Stitches knitting group. Classes offered this year included Coming of Age, Sunday morning religious education, In & Around Follen, Learning About UU, and Buddhist classes. Special events included a leadership launch, an audiovisual info session, a leadership training seminar, a stress reduction workshop, and videos and presentations related to climate change and care of the earth. Follen folks gathered in great number on Sunday mornings for worship and community hour and got together at other times for soup suppers, holiday crafts party, Christmas tree selling, a peace walk, fellowship dinner, rebuilding in New Orleans, the goods and services auction, Anne Smith Room Gallery receptions, serving meals to people in need, the FUUY coffeehouse and a new adult coffeehouse in May. Those interested in joining an interfaith group to help families in transitional housing packed a meeting room after worship one Sunday, and another Sunday Follenites from near and far packed the community center to bid farewell to departing long-time members Dennis and Sally Brown. This has been a full year, indeed.

Interesting rentals included a demonstration of Flamenco dancing, an evening with author Joyce Maynard, the annual meeting of the Lexington Arts and Crafts Society's Woodworkers Guild, and a Rising Star Quilters workshop on the Japanese sashiko technique. As always, musicians enjoyed performing in the Sanctuary: 23 concerts and recitals are on the 2013-14 calendar, most by returning artists and teachers of voice, piano, violin or cello.

Many thanks to the students and faculty of the French for Kids Nursery School, Follen's long-term tenants, and to the Waldorf School community, our close neighbors, for the lively presence and cooperative spirit they bring to weekdays at Follen. Special thanks to the Waldorf Facilities Manager, Paul Menz, for plowing the driveways and parking lots all winter and for accommodating our requests for overflow space whenever possible.

I have been delighted to work with Cindy during her first full year as Follen's Communications Coordinator and with Jimmy during his second year as Sexton. A sincere thank you to both of them for their ongoing commitment to doing an excellent job for Follen while also making our work days together truly enjoyable. Thanks to Dennis Bromley as well, for showing up week after week to do the after-church work of Sunday Sexton. Cindy and Jimmy and I also wish to express our appreciation for our other warm and wonderful weekday colleagues: Catherine, Claire, Debra and Thomas, along with all the Follen staff members we see only at the annual staff holiday party. We feel privileged to be part of this community.

Respectfully submitted,
Sarah Garner, with Cindy Gallagher and Jimmy McFeeley

MEMBERSHIP COORDINATOR

Catherine Collins

Newcomers and New Members

Membership has had a great year with the installation of our new minister, Reverend Claire Feingold Thoryn. Since April 30, 2013, we have welcomed 22 new members to Follen. We celebrated most of them on April 6 at our Membership Service. Nine of the people who signed the book at the service came forward during the Open Pulpit call. Some of our new members only recently started coming to Follen, most of them since the fall of 2013. Already several of them are involved in various committees, sharing their talents and areas of expertise.

This year brought many "church shoppers," visitors and newcomers to Follen. Of the 77 guests we had sign the guest book to date, 27 of them still come on a regular basis.

Classes

The **In and Around Follen** and **Learning About UU** classes were fairly well attended this year. There were 11 people in the fall and 6 people attending **In and Around Follen** in the spring. Among the participants were 1 or 2 current members of Follen who came to hear more about updates to ongoing programs and activities at the church. Eight people attended the **Learning About UU** class with Reverend Claire in the fall and 9 people attended in the spring. Approximately one third

of the spring **Learning About UU** class were long time members of Follen.

Events

The Membership Coordinator assisted the Membership Committee in coordinating both the Welcome breakfast in the fall, and the New Members breakfast in the spring. Forty four people attended the Welcome Breakfast and thirty nine attended the New Members breakfast on April 6.

Programs

Hosts

This year we again had a very enthusiastic and welcoming team of 12 hosts who greeted newcomers at the front door and followed up with them if they attended coffee hour. On numerous occasions, newcomers and visitors alike have remarked upon how "welcomed" they felt at Follen by both hosts and members alike. Hosts also helped out by setting up the vestibule information and Welcome Table in the community center when the Membership Coordinator was away on a Sunday. The host team this year included: Lynn Arenella, Dennis Brown, Karen Edmonds, Karen Gray-Carruthers, John Lawlor, Walter Leutz, Jill Reurs, Jane Spickett, Don Snodgrass, Marlene Stone, Lydia Swan and Lil Swanstrom.

Connections Program

This year the Membership Committee in collaboration with Reverend Claire and I designed a strategy to connect newcomers with people who have been attending Follen for a number of years. We decided to set some specific criteria. If a new person or family attended more than one worship service they were paired with a Follenite who lived in or near their neighborhood. Some families were paired with a family who had children of similar ages. The person from Follen would contact the new person or family for an in person or telephone meeting. The new person or family would have an opportunity to ask questions and receive both information and resources. To date, we have paired 14 new individuals or families with 12 Follen people who volunteered to reach out to newcomers. The project began with volunteers from the Social Events Committee. The goal for next year is to formalize the program and invite the entire Follen community to become involved.

Collaboration and Communications

I served on the newly reformed communications committee this year, and joined the subcommittee on Media and Publicity. A task we elected to undertake was to interview our newcomers of the past 2 years to elicit both their reasons for seeking out Follen as a church to visit, and reasons they continued to return. The idea was to help the subcommittee develop marketing messages for both our website and our publicity materials. The membership committee in collaboration with the Media and Publicity subcommittee designed a set of brief questions and contacted the people on the list. The six members of the committee interviewed 13 people via telephone, e-mail or in person contact.

Professional Activities

I am a member of the Unitarian Universalist Association of Membership Professionals (UUAMP), which provides resources and webinars to membership coordinators to assist them in their work. The UUAMP is sponsoring a full day Membership Professionals workshop at General Assembly in Providence this year. It will be helpful to gather some information about membership strategies and practices nationwide. I also attend the regional group of membership coordinators in the greater Boston and "beyond" area. We meet every 2 months to share ideas and resources. I also had the opportunity to attend 2 Clara Barton workshops this year. I attended the workshops "Congregational Conflict" in the fall and "Speaking of Class" in the spring.

I'd like to thank our Sunday morning hosts, the faithful members of the Membership Committee and the greater Follen community for being so welcoming and supportive to our visitors, newcomers and new members this year. On numerous occasions I have accepted compliments on your behalf. A special thanks to Laura Maltby, chair of the Membership Committee for her ongoing support and counsel to me in my role as Membership Coordinator.

Finally, I'd like to thank Reverend Claire and the very competent staff at Follen (Sarah, Cindy, Debra, Thomas and Jimmy) for their ongoing support, good humor and guidance.

Respectfully submitted,
Catherine Collins

LAY LEADERS

PARISH BOARD

Jack Donahue, Chair

Tom Blumenthal, Vice-Chair

A radical, hotly contested break with tradition marked the start of the church year for Parish Board. One member—requesting anonymity, for reasons that will become obvious—reached out to the chair prior to the first meeting to confess a preference to avoid eating cookies from 7:30 to 9:00, and thus to request that the Board's long-standing snack policy be reconsidered. The issue was accordingly raised at the first meeting of the year. As debate progressed it became clear that a heretofore unrecognized anti-snack majority existed. By a 6-1 vote, Parish Board suspended the practice of taking turns bringing snacks to each meeting, with (rail-thin) trustee representative Dave Weissburg lodging a bitter dissent.

As tempers cooled after the snack controversy, Parish Board commenced a productive year. Two ongoing themes made the 2013-14 church year an especially happy one for the Board. One of these was the opportunity to welcome, work with, and come to admire Rev. Claire. She opened each meeting with a brief chalice-lighting blessing, and while her membership is non-voting her participation in our work gave Board members an early, privileged view of her wisdom and her devotion to Follen. Recognizing her dual roles as minister and young mother, Parish Board attempted to end our meetings and send her home near the scheduled 9:00 PM adjournment, and usually succeeded. The second happy theme was the exceptional number of new members (whom Parish Board must formally approve) signing the book over the course of the year, including a remarkable surge of 19 new members in April.

We worked on, but did not bring to closure, the development of a ministerial assessment process carried over from the 2012-13 church year. The prior Parish Board had completed a draft process, but suspended that work pending Rev. Claire's engagement. As this year progressed she reached the judgment—and the Board concurred—that it is more important to get the assessment process right than to complete it quickly. We intend to continue refining our ideas for how best to channel relevant and accurate

information, in an appropriately positive manner, among the minister, staff, lay leadership, and congregation at large. Another important enterprise, continued over from last year and still in process, is the development of a comprehensive communication policy for Follen. At the request of both Parish Board and Program Council, Gordon Hardy continues to lead this effort. Many excellent and creative ideas have already been surfaced, and we anticipate a vote on at least some aspects of communication policy early in the next church year.

In addition to various routine duties, such as approving contracts and Program Council's annual plan, two major undertakings claimed large shares of our time and energies. The first was structuring a process to produce a new five-year strategic plan. The inaugural long-term plan under the 2009 bylaws is coming to a close, and Parish Board is tasked with leading the development of a strategic framework for 2014-19. Our approach to this task begins with the recognition that the 2009-14 plan is a magnificent product of enormous amounts of work to define our fundamental shared goals and obligations. It would be foolish and wasteful to consign that plan entirely to the past and start fresh. So we resolved to build on rather than replace that foundation, and focused our work on identifying what has *changed* since 2009 that should be taken into account as we chart a course for the next five years.

We recruited four strong Follenites outside Parish Board—some church members of long standing, others new—to chair “task forces” to identify candidates for the major new realities our updated strategic plan should recognize. (These leaders were Carl Byers, John Dacey, Karen Gray Carruthers, and John Griffith.) Each task force leader recruited four other members, and each task force developed its own methods for surveying its assigned domain to develop candidates for the post-2009 developments most salient for Follen's next five years. A list of 20 such new realities—five each for new developments in the world at large; in the nation; in the communities around Follen; and in the church itself—has been distilled from their work. This list will be shared with the congregation in May to solicit as wide as possible a range of views on the relative priority of these new realities. This congregational input, and consultation with leaders including Action Team chairs, will inform a

“strategic plan update” to be drafted over the summer and presented to the congregation for discussion and a vote early in the 2014-15 church year.

A second major effort may prove to be relevant to the strategic planning process, since the 2014-19 period marks the start of what most experts believe to be the last few decades in which it is possible to forestall the worst effects of global climate change. Eager to ensure that this opportunity for a well-considered congregational response to this challenge is not wasted, and that climate becomes a uniting rather than a dividing issue for all of us, Parish Board drafted a discussion paper on the future of fossil fuels and Follen. The paper is structured as the opening round of our acceptance of an Action of Immediate Witness voted at last year’s UUA General Assembly urging congregations to consider a range of actions to counter current trends toward climate disaster. After multiple drafts a version of the paper was unanimously accepted by the Board in March. But learning that the Environmental Justice Task Force had scheduled a mid-April forum on fossil-fuel divestment, and anxious not to ignore information that might arise at that forum, we voted to delay and if appropriate redraft the paper. A somewhat amended draft was prepared in late April. If it is approved by a majority of the Board—which would have occurred before this report is published—the paper will be shared first with members of Follen’s leadership beyond Parish Board. These Action Team chairs and other leaders will be given an opportunity to offer observations on the Parish Board paper, from the vantage points of their own positions of responsibility to the congregation, before the discussion paper is distributed (along with other leaders’ observations) to the congregation, according to current plans by June 1. This paper settles no questions and issues no proposals, but instead is meant to launch what we expect and hope will be an extended, respectful, and productive conversation over how Follen should best respond to this grave threat to our shared interests and values.

Respectfully submitted,

Jack Donahue, Chair
Tom Blumenthal, Vice-Chair

PROGRAM COUNCIL

Alice Dunn, President

Program Council is the principal operating body of the church, responsible for the management and implementation of Follen affairs. It is comprised of the minister: Reverend Claire Feingold Thoryn; several staff members: Debra Zagaeski, Thomas Stumpf, Catherine Collins, and Sarah Garner; the President; John Lempesis (Vice President and President-elect); Harriet Peterson (Secretary, who graciously agreed to step in mid-term to replace Sylvia Boyd); Ginna Johnson of the Nominating Committee; and the representatives of the seven Action Teams: Tom Ryan of Buildings and Grounds, Caroline Walters of Community and Hospitality, Sally Cassells of Financial and Human Resources, Linda Dacey of Pastoral Care, Tara Fleming of Religious Education, Jean Foster of Social Justice, and Laura Maltby of Worship and Music.

Our first order of business was welcoming Rev. Claire Feingold Thoryn to Follen, and to our myriad customs and habits, and to how our governance supports and coordinates with our staff and community. To provide context for Claire and to refresh ourselves for this new start, we worked with Parish Board and held a well-attended Leadership Launch session in September, with presentations on how our By-laws support our church policy and operations, on the cycle of the year at Follen, on stewardship, and on the planning processes we use and will be enacting for our new Long Term plan.

The enthusiastic response to Claire’s work has brought crowds to Follen, and we have worked hard to coordinate a true Follen welcome. The ushers regularly reported on how they were managing large numbers in the Sanctuary, Social Events handled larger coffee hours, Membership amplified the Hosts program and a new covenant group was established. Program Council also voted to establish a Minister’s Initiative Fund, to give Claire some financial means to enact new programs. Many hands worked hard, led by an ad hoc group chaired by Bart Carr, to support Claire’s Installation ceremony and reception in November.

Riding the wave of excitement, the Stewardship process started in early fall, with a wide-ranging discernment process both at Program Council and Parish Board, and throughout the Action

Teams, to set the goals for the pledge drive. These became Reach In, Reach Out and Reach Up: to increase Social Justice funding, to "right size" staff compensation and set goals for improving benefits equity, and to support Claire's hope to have a Ministerial Intern in fall of 2014. Claire and a hiring committee immediately started reviewing candidates, and with boost from a UUA grant, Hillary Collins-Gilpatrick will start as our two year, part-time Ministerial Intern in Sept. of 2014. A bonus: we also have hired her to be FUUY advisor in Sept. 2014, after Emma Puka-Beals steps down.

After a very successful Stewardship Campaign, chaired by Hill Snellings, our current year's finances are very good, with added benefits from an early start to the payments from the new cell tower tenant, AT&T. The East Village Fair had a banner year, and while the harsh and early winter storms dented Christmas Trees sales (but not the happy spirits!), the wonderful pledging results and enthusiastic work allowed Program Council to easily pass a budget with all budget requests fully supported, and the possibility of creating reserve funds for personnel needs. As President, it was great to be able to say yes to so many, and to feel our willingness and goodwill yield such wide-ranging support.

Besides our happy growth, some of the biggest topics of the year were how we support special activities, and role of Share the Plate and other congregational fund-raising requests. Most discussion involved a Social Justice Action Team (SJAT) proposal: Mark Metzger and Dennis Brown proposed a novel mechanism for funding social justice work through linking Christmas Tree sales to a set-aside earmarked for social justice. After many thoughtful discussions and numerous rounds through the Action Teams and Program Council, the motion was tabled for further discussion. Opinion was divided on earmarking funds versus supporting through the general funds, but the net result was uniform support from PC for increasing social justice funding, and this was immediately reflected in the Stewardship Campaign goals.

Having recognized the success of the Share the Plate fundraising model (which is to collect funds that are passed on to groups we support doing social justice work outside of Follen), we also authorized several special collections to provide support within Follen's community. These collections included one during the Youth Group

(FUUY) service to support Follen youth to attend the UU General Assembly, and for Caring Congregation to support Follen families who have children with special needs.

Other large topics that came before Program Council included the question of whether Follen should divest its endowment funds from fossil fuel company holdings, as part of a larger UUA Action of Immediate Witness. This was brought forward by Jean Foster, SJAT chair, and is being reviewed through Parish Board and the Trustees, and will continue to be discussed next year, with many forums and educational sessions.

One of our Annual Plan goals was to improve communications policy and procedures. With direction from an energized Communications group, led by Gordon Hardy, Program Council approved funding for a new website design, approved streamlined procedures for videotaping the services (and our services are once again available to view on-line) and for Follen's new social media presence on Facebook. Among other topics: as we developed our Annual Plan for next year, we were also in discussion with Parish Board on the Long Term Plan process. Program Council voted on a number of human resource issues, among them improving staff retirement plans.

My thanks: many, many thanks to Sylvia Boyd, who acted as Secretary through the fall, and to Jean Foster, who stepped in to record the minutes, until Harriet Peterson accepted the role of Secretary. Harriet will be staying on through next year, and we are delighted to have her experience and continuity. It was a busy year, and it was my great pleasure to work with such an energetic and dedicated group, volunteers and staff alike! We care and share and build our community, even in meetings, always taking time to light our chalice and remember our spiritual vision and mission.

NOMINATING COMMITTEE

Nick Hart and Ginna Johnson, co-chairs

The Nominating Committee (NomCom) is charged with presenting a slate of candidates for all positions to be elected by the Membership at Annual Meeting. In addition, in collaboration with the Program Council, Parish Board, and Coordinating Team, NomCom is responsible for

developing ongoing leadership training programs and succession plans.

2013-2014 Church Year:

To the extraordinarily capable people who filled leadership roles at Follen during the 2013-2014 Church Year and will be stepping down, we thank you for your enthusiasm, your generosity, and your wisdom:

Program Council:

President: Alice Dunn
Secretary: Sylvia Boyd
Interim Secretary: Jean Foster
Action Team Representatives:
Financial & Human Resources: Sally Cassells
Community and Hospitality: Caroline Walters
Religious Education: Tara Caruso-Fleming
Social Justice: Jean Foster
Worship & Music: Bart Carr

Parish Board:

Vice Chair: Tom Blumenthal
Representative-at-Large: Wilma Ronco
Trustee: David Weissburg

Nominating Committee: Anne Engelhart and Ginna Johnson

2014-2015 Church Year:

We are delighted to announce the slate of candidates for the 2014-2015 Church Year. We thank those members who have accepted nominations to serve and to those to have agreed to continue in their current positions:

Program Council Candidates for Election:

President: John Lempesis
Vice President: Sally Cassells
Secretary: Harriet Peterson (2nd year)
Action Team Representatives:
Buildings & Grounds: Tom Ryan (2nd year)
Community & Hospitality: Heather Ryan
Financial & Human Resources: Brian Cali
Pastoral Care: Linda Dacey (2nd year)
Religious Education: Leslie Stebbins
Social Justice: Stan Griffith
Worship & Music: Laura Maltby

Parish Board Candidates for Election:

Vice Chair: Howie Bernstein (1st of 2 years)
Representative-at-Large: John Dacey (1st of 3 years)
Trustee: David Garbarino (1st of 3 years)

Parish Board Members (continuing to serve):

Chair: Jack Donahue (2nd of 2 years)
Treasurer: Bob Heingartner (4th year)
Clerk: Anne Rodman (2nd year)
Auditor: Ellen Adolph (2nd year)
Representative-at-Large: Kyle Johnson (2nd of 3 years)
Representative-at-Large: Rosemary Trowbridge (2nd of 3 years)
Trustee: Chris Farnham (3rd of 3 years)
Trustee: David Hobbie (2nd of 3 years)

Nominating Committee Candidates for Election:

Suzie Byers (1st of 3 years)
Alice Dunn (1st of 1 year)

Nominating Committee Members (continuing to serve):

Beth Bernstein (2nd of 3 years)
Nick Hart (3rd of 3 years)
Alexis Johnson (3rd of 3 years)
Herman Marshall (3rd of 3 years)
Meg Muckenhoupt (2nd of 3 years)

NomCom sponsored a workshop on Sunday, April 13 entitled *Making Meetings Work (at Follen and Beyond!)*. Led by Brian Cali and Simon Horsburgh, the workshop reviewed how to make meetings effective, efficient, and enjoyable...starting with the question, "Is this meeting necessary?" We so appreciated Brian and Simon's insights that we asked them to offer the program again next fall!

NomCom works hard to recruit candidates that reflect the diversity of the congregation. This year, with the encouragement of Rev. Claire Feingold Thoryn, NomCom made a special effort to invite newer members (less than 5 years) to join long-time members in leadership roles. NomCom encourages all Follenites to let us know of their interests and their availability. Indeed, we feel blessed to have so many volunteers willing to renew the stewardship of our church each year. Like the favorite hammer whose handle and head have both been replaced many times, Follen's legacy of service is in fact each of you working tirelessly to support our congregation. Our profound thanks to all who give so generously of their time.

Respectfully submitted,
Beth Bernstein, Anne Engelhart, Nick Hart, Alexis Johnson, Ginna Johnson, Herman Marshall and Meg Muckenhoupt

ACTION TEAM REPORTS

BUILDINGS AND GROUNDS

Tom Ryan, Chair

The 2013-14 church year started with the summer reconstruction of the entrance to the Community Center. The new pavers, granite wall and plantings with the associated drainage work ends a multi-year series of projects around the Community Center to address several drainage problems that have caused flooding in the Community Center for a long time.

The Committee has seen several new members over the last year and with Jimmy's continued stellar performance there has been no shortage of people to address the many needs of our facility. Jimmy has emerged as our liaison to the Town DPW. He was able to get a pothole repaired (after a member was injured) and to get a commitment to remove the leaning pole at the corner of the Community Center after Mart repaired our light in the same location.

After Lynn's injury on the vestibule steps, we are exploring a number of improvements to the steps to improve traction and reduce the likelihood of future injury.

Mart has been the point person in the ATT work in the steeple and the project has been continuing with minimal disruption to the building. He has also been the point person in addressing the repairs needed to the emergency lighting system and the dishwasher.

The winter was particularly snowy and cold resulting in a couple of ice dams and the purchase of a new (larger) snow blower for Jimmy to use in clearing snow.

The Committee was also heavily involved in the discussion of earmarking the proceeds of the Christmas Tree sales to Social Justice. The discussion dominated several BGAT meetings before it was resolved.

It was discovered that the handicapped lift has not been inspected for a number of years due to the lift maintenance vendor going out of business. There is a substantial potential of a fine for this lapse and several members of BGAT are responding to the State over this issue.

We are planning to do painting and repair on the Community Center and Church Exterior and upgrade the AV system in the Church and Community Center as well as continue to study universal access to all areas of the Church and Community Center.

BGAT Committee members this year include: Howie Bernstein, Larry Cohen, Andy Dixon, Arie Derksen, Alice Dunn, Stephen Ervin, David Fertitta, Cas Groblewski, Megan Lancaster, Karen Longeteig, Mart Ojamaa, Valerie Perkins, David Rines, Paul Rubin, Tom Ryan, Greg Shenstone, Nancy Sofen, Jen Vandiver, Kim Vandiver, Chris Walters

2013-14 Anne Smith Gallery Shows

Group shows:

Opening - Amanda Hopkins (poem), Ann Schauffler (soft sculpture), Carolyn Kingston (mobiles), Rev. Claire (oil painting), Dennis Brown (photography), Emily Vail (leatherwork), Jane Spickett (assemblage), Kevin McCarthy (sculpture), Tempe Goodhue (oil pastel)

Coming of Age shrines - COA youth and mentors

Solo shows:

Kevin McCarthy - sculpture
Sylvia Boyd - needlepoint
Kathy Spang - oil and watercolor
Ginny Simons - watercolor

Anne Smith Gallery committee - Ann Schauffler, Jane Spickett, Tempe Goodhue

COMMUNITY AND HOSPITALITY

Caroline Walters

Our action team consists of the Membership, Social Events, and Communication Groups. The Community and Hospitality Action Team, referred to as CHAT, envisions Follen Church Society being a place where its members, newcomers and visitors will meet, connect, learn, develop friendships, and have fun in a warm and welcoming community. Being welcoming and inclusive on Sunday mornings and helping people make connections with one another to increase their feeling of community is a big focus of our teams, and we work hard to make this happen. Please find each sub-group's Annual Report below.

COMMUNICATIONS COMMITTEE

Gordon Hardy, Chair

The Communications Committee made significant strides for Follen in 2013-2014. Reformed after a few quiet years, we undertook to standardize and improve four areas of communication:

- Policy and procedures
- Website and other e-communications
- Internal communications
- Branding, marketing, and media outreach

Policy and procedures was our first priority. As Follen has improved its governance over the past few years, communications policy has not kept up. For some years, for example, we have been videotaping services, but a lack of policy was preventing these from appearing on the website, or broadcast on local television.

The committee drafted, and Program Council approved, basic guidelines restricting the use of personal or private information in communications, including: the principle that participation in Follen events constitutes consent to the use of participants' images in Follen communications; a simple opt-out system for anyone who does not want their information or image published; and regular notice of implied consent, plus specific instructions for opting out, in orders of service and other media.

As a result, our intrepid AV team has been able to post videos of Reverend Claire's readings and sermons online at <http://follen.org/sunday-services/sermons>. Joys, Sorrows and Concerns are private and not videotaped. More parts of services, including music and worship time, are planned to be online in the future.

Another important aspect of policy was that Program Council, with the concurrence of Parish Board, gave the Communications Committee broad authority to set guidelines and procedures for internal and external communications.

Website and e-communications: Early on, we identified that our e-communications had two audiences: the website was really intended for people who do not know us well, and want to learn more about Follen. E-communications, mainly in the form of the Follen Friday Update and the monthly newsletter, were aimed more at

current members of the community. Both were in need of review, guidelines and coordination.

We established guidelines for communications, including an editorial style guide, tips for web writing, and planned for an integrated operation of our various communications: newsletter, website, Follen Friday updates. We have started a redesign of the www.follen.org website and the Friday update. The issue of a designed Follen logo and "brand" proved complicated, as is usually the case; by this writing efforts were underway to come to a decision. The new website and graphic identity are anticipated to be completed during summer 2014.

Internal communications: we found that many Follen work groups and action teams work in many different ways, on many technologies, to communicate with each other. There are also programs long established, such as the Follen Photonet, which we believe are underused or not well understood. The committee is working to offer guidelines for such internal, secure communications in the near future, while recognizing that each working group may have its own way of doing things.

Branding, marketing, media outreach: One subgroup on branding identified two major aspects of Follen that are points of interest to outsiders looking at us: "spiritual home" and "children." A subgroup is currently offering guidelines for how to carry out these emphases in our communications. The group is also creating a set of procedures and a contact list for media outreach to publicize Follen events such as the East Village Fair.

This has been a remarkable year for the Communications Committee. The chair, Gordon Hardy, wishes to thank members Catherine Collins, Jean Foster, Tempe Goodhue, John Griffith (who has agreed to become next year's vice-chair), Fred Johnson, Juli Jorgenson, Herman Marshall, Mark Metzger, and Meg Muckenhoupt for their dedication and hard work in reviving a crucial part of Follen's governance and operational success. Thanks, too, to Reverend Claire, Alice Dunn, Jack Donahue, John Lempesis, and Tom Blumenthal for all their good input and organizational help.

SOCIAL EVENTS COMMITTEE

Jenny Marshall and Heather Ryan, Co-Chairs

The Social Events Committee works to build community and fellowship through a variety of annual events. The list that follows includes happenings that Social Events has traditionally stewarded from publicity, signups, and organization to implementation. This year SE has included the signup, organizing and setup of food for the now *annual* Follen Auction as an official SE responsibility. Our primary responsibilities include:

- Community Hour after every Sunday service, including “coffee elves,” food, coffee and tea supplies and kitchen duties
- Fall and Spring Octagon Dinners
- Halloween Party (soup and pumpkin carving)
- Christmas Caroling Potluck (with help from our Choir Directors)
- Christmas and Easter Flowers, includes decorating the sanctuary and honoring loved ones in the Order of Service
- Food, set-up and serving of the annual Stewardship Dinner
- Cardigan Lodge signup and organization
- Organize and recruit soups for the Follen Auction and manage setup of food area
- Cape Cod Weekend signups and coordination
- Food, set-up and hospitality support for other special events as needed
- Annual kitchen clean-up and coordination of maintenance with Building and Grounds
- Monthly Soup Suppers

This year was a very exciting and considerably busy year with the arrival of our new minister. We noticed a significant increase of people in the Community Center during coffee-hour. We have also noticed many new faces and families during coffee hour and strive to make connections with newer members and friends as they pass through the coffee line.

In addition to the wonderful, long-time roster of faithful SE members listed below, we are happy to report that four new members have joined our

team: Dennis Dracup; Rebecca Farnham; Erin Malone; and Amy Yee. The rest of the SE gang is very happy to work side-by-side with our newest members. In addition to our new recruits the Social Events members also include: Beth Bernstein; Laurel Carpenter; Sally Cassells; Bob Halliday; Melissa Hawkins; Maureen Markelz; Jenny Marshall; Sarah Richards; Marlene Stone; Lydia Swan; Rosemary Trowbridge; Heather Ryan; and Caroline Walters.

Special thanks are given to our many “coffee elves” who are not SE members, but who dutifully help with coffee hour on a regular and continuing basis. A note to newer members and friends of Follen: serving on SE or as a coffee elf is a fun and easy way to get to know people. We welcome all Follenites to join us in the kitchen!

MEMBERSHIP COMMITTEE

Laura Maltby, Chair

The members of the committee for 2013-14 have been: Karen Edmonds, Juli Jorgensen, Betsy Leutz, Laura Maltby, and Gerry Mimno. We worked very closely with Membership Coordinator Catherine Collins, and benefitted greatly from consultation with Rev. Claire.

We continued to offer the traditional Welcome breakfast in the fall, and a Membership breakfast in the spring. Both of these events were enthusiastically attended by newcomers, new members, and established Follenites.

One of our primary new initiatives was sponsoring the Action Team Job Fair in January. The goal was to increase awareness of the work of each Action Team and to publicize ways to become involved without a major commitment of time and energy. All seven Action Teams participated, and many people signed up for greater involvement. We intend to sponsor two AT Job Fairs next year.

We also began a new Connections Program, where we asked a broad spectrum of Follenites to reach out to newcomers. We intend to formalize this program next year.

A new covenant group began in late fall, led by Betsy Leutz and Anne Rodman. We tracked the progress of the group very closely, as many of the group members were newcomers.

The Membership Committee felt that it would be wonderful to reach out to all members of the community on an annual basis, in addition to the once a year calls/visits by the Stewardship Committee. We asked Hill Snellings, chair of Stewardship, if he thought the stewards could make a second call, towards the end of this church year, to touch base with all Follenites, simply as another point of connection. He graciously agreed, and we expect these calls to begin soon.

With many visitors and newcomers this year, it was our goal to encourage the entire congregation to take greater responsibility for being welcoming. We have received feedback from many newcomers that they felt very warmly welcomed by everyone. On behalf of the Membership Committee, I would like to thank the entire congregation for assisting us in this way.

Laura Maltby, Chair

FINANCIAL AND HUMAN RESOURCES

Sally Cassells, Chair

The Financial and Human Resources Action Team manages Follen's financial and human resources. We strive to keep an eye on the long term, to effectively balance both revenue and expenses and to ensure that we offer appropriate support to our wonderful clergy and staff. FHRAT takes seriously its obligation to carefully consider its recommendations to Program Council on financial and human resources matters. The sub-teams within FHRAT are Finance, Human Resources, Stewardship and the Legacy Society.

The arrival of Reverend Claire has brought new energy to our already thriving congregation. It has also contributed to a strong year from a financial point of view. Our plate collections have increased driven by increased attendance, our Goods and Services Auction results were up by almost 50% and our Stewardship campaign reached its goal of an overall 7% increase in pledging.

More good news from the financial point of view is that we now have a contract with AT&T for rental of our steeple space and we are now receiving monthly payments so we have drawn somewhat less than expected from the 'Sprint Nextel' Reserve Fund. We are all very grateful for

Herman Marshall's leadership in pulling together this contract.

As our congregation grows it is important that we live out our Unitarian Universalist principles by providing 'right-size' benefit packages and salaries to our staff. The budget we have developed for next year reflects this principle by increasing our contribution to our employee's health benefits. Our staff members sustain our many and varied activities in more ways than we appreciate – they are truly our partners in helping us change lives together.

Finance

The Finance Team monitors the financial operations of the church through the reports provided by our Church Administrator Sarah Garner and the recommendations of our Treasurer Bob Heingartner.

The principal task of FHRAT is the development of a recommended annual budget. The key inputs are from Program Council, Action Teams, Human Resources, Sarah and Bob and Stewardship. Sarah incorporates the input into a series of budget drafts. The finance team guides the process of getting revenues and expenses to balance out and makes a recommendation to Program Council for the proposed budget offered as part of this Annual Report.

One of the issues we have worked on this year is managing our non-budgeted contributions. These include Share-the-Plate and other social justice related fundraisers as well as special collections to provide financial support to initiatives led by the Religious Education and the Pastoral Care Action Teams.

When we began the Share-the-Plate program three years ago, we knew that we were likely to see a drop in our regular plate revenues but we were hopeful, based on experience in other UU congregations, that this would be temporary. Happily this has turned out to be the case.

Elsewhere in this report is a listing of all of the ways in which our fund-raisers, special collections and share-the-plate are contributing in positive ways both inside and outside of our church.

2014 Finance Committee members: Bob Heingartner, Sarah Garner, Brad Howe, Mark Metzger, Herman Marshall, George Grady, Brian

Cali (incoming chair), Sally Cassells (outgoing chair).

Stewardship

A vibrant and energetic Stewardship Team continued to implement and build upon the work of the ReThink process and the success of last year's campaign. This year's campaign set a new record pledging total of approximately \$435,000. The campaign for 2014-15 successfully continued initiatives, developed enhancements, implemented recommendations, recognized other factors that affected our work, and identified areas of future opportunity.

Continuing Initiatives

The Stewardship Team continued to build upon the ReThink processes and successes of the last drive.

- 1. Pre-drive meetings with Follen leadership to develop the drive message and to communicate goals:** Throughout the Fall, the Stewardship Team Co-Chairs met with Program Council, FHRAT, and Parish Board to look in the rearview mirror, listen, and then look ahead to craft the major pillars of the Stewardship Campaign theme and case.
- 2. Initiating a leadership and large donor "quiet period":** Recognizing that a substantial percent of pledge dollars come from a small number of Follenites, we formed a team to solicit pledges -- before the drive kickoff -- both from large pledgers and from lay leadership. This resulted in a substantial level of pledges raised before the official launch of the drive. We also continued the practice of a pre-drive leadership launch event to test the campaign message.
- 3. Returning to a specific dollar ask method of solicitation:** We continued the renewed practice of asking pledges to consider a specific, targeted pledge dollar amount for the drive. Visiting stewards were informed, confidentially, of the previous pledging levels and asked pledgers to consider a target dollar amount of pledging.
- 4. Changing the culture of money:** At the Fellowship dinner, the theme of the drive was announced twice, at moderate length. Throughout January, Stewardship messages were delivered at services in the style of East Village Fair. The Stewardship service included

a personal point and Reverend Claire delivered the memorable "pledge versus nightstand" sermon. We created a brochure with more drive details, and we communicated drive updates periodically through Follen Friday Updates. At services we began clearly recognizing and thanking Follenites for financial contributions when the offertory baskets are brought forward, and have engaged with WMAT regarding how to make that recognition meaningful.

Enhancing Developments

The Stewardship Team developed the following enhancements.

- 1. Increased Transparency:** We developed a "spectrum of giving" with specific percentages and dollar amounts to illustrate the breadth and depth of financial generosity of Follenites.
- 2. Confidentiality Policy:** We developed a written confidentiality policy (published on the church website) that was included at the trainings for stewards.
- 3. Systematic Identification of Potential Pledgers:** Through outreach to the minister, membership, the church administrator, the DRE, and others, the Stewardship Team sought to identify all potential pledging units
- 4. Train the Trainers:** We implemented a training session for trainers to provide reduce key-person dependency on our longtime stalwart trainer Brian Cali.
- 5. Legacy Society:** Legacy Society contact information was included in the brochure and in most Stewardship communications.
- 6. Steward Identifying Tags:** All stewards were offered a "Reach Up!" badge so that they were easily identifiable.

Recommendations Implemented

The following recommendations from the previous Annual Report were adopted and implemented.

- **Created a stewardship leadership triad**, similar to the EVF leadership succession, to improve succession – Nominating Committee and

Stewardship. The Committee is in search for its third co-chair.

- **Continued to hold a pre-drive meeting with Follen lay leaders** – Stewardship, Program Council, Parish Board and Minister
- **Continued to solicit leadership and large donors before the drive** - Stewardship
- **Continued to request pledgers consider pledging a specific amount** - Stewardship
- **Linked stewardship efforts with membership** and investigated inflow/outflow of pledgers in previous years – Stewardship and Membership Committee
- **Expanded stewardship committee involvement** – Nominating Committee and Stewardship Note, while we significantly increased the size of the overall Stewardship Team, the size of the core work group was not substantially increased.
- **Revitalized Legacy Society:** Under Cas Groblewski's leadership, Legacy Society increased its outreach and re-established the Legacy Society Dinner.
- **Capital Campaign:** Stewardship requested the Parish Board to consider a Capital Campaign for its next five year planning cycle.

Recommendations

- **Continue Summer Planning Start and Early Fall Team meetings** - Stewardship
- **Recruit Stewardship Communications Director to Communicate Stewardship messaging** throughout the year, not just during the drive – Stewardship, Program Council, Parish Board and Minister. The Team identified this position and developed a job description, but was unable to fill the position.
- **Consider Full-Spectrum Stewardship** to include RE participants, FUUY, and youth (until they are settled elsewhere).

Other Factors Affecting Our Work

The campaign results were affected by many factors. There was great enthusiasm resulting from the settlement of our new minister. We also had a history of substantial pledging increases in previous years which meant that some givers were unable to increase further.

Thank You

Follen's annual stewardship drive benefitted from the consistently excellent support from **Sarah Garner**, Follen's Church Administrator.

Tempe Goodhue, Amy Yee (brochure team)

Jenny Marshall, Rosemary Trowbridge, Laurel Carpenter, Amy Yee, Beth Bernstein, Howie "Pulled Pork" Bernstein, Caroline Walters, Erin Malone (Stewardship dinner team)

Kyle Johnson, Alex Bromley, Meg Muckenhoupt, Karen Gray Carruthers, Jon Edson, Chris Farnham, and Stephen Ervin (Stewardship dinner entertainment team).

Our team of pledge stewards.

Stewardship Committee Members: Hill Snellings FY14 chair, Marlene Stone FY 15 Chair, Maggie Pax FY13 Chair, Brian Cali Chair Emeritus, Sally Cassells, Herman Marshall, Brad Howe, Jane Spickett, Cas Groblewski (Legacy Society), Bob Halliday, Kim Vandiver, Mark Metzger, Lydia Swan, Fred Johnson

HUMAN RESOURCES

Nancy Sofen, Jim Fesler, Committee Members

Thanks largely to the highly successful stewardship campaign, the FY 2015 budget submitted to Annual Meeting for approval includes the increases in compensation and benefits for Follen employees. Most notably, there is sufficient funding to allow for all full-time employees to have the same health insurance benefit that our ministers have enjoyed for several years. A motion has been forwarded to Parish Board to formalize the policy change. All salaries and wages will increase 1.5% to reflect the cost of living, and some employees received larger increases to bring them closer to UUA fair compensation recommendations or to recognize that their job description has expanded.

Also this year Follen adopted the UUA's new retirement plan which now allows all employees, including those not eligible under the previous plan, to make voluntary contributions to a retirement account. We also hired a ministerial intern and increased the sexton's hours by 10%. We will be working on establishing a Human Resources Reserve Fund to provide a cushion to the annual operating budget in the event of sudden changes in our obligations due to new hiring, an employee deciding to take health insurance, or other unforeseen benefits expenditures.

Fair compensation for our staff is a moving target – just as we met our goal for paying our staff at the mid-point for our church's size and location, the UUA announced new salary guidelines.

We have followed changes in health insurance law and marketplace with interest, and felt that the field was too unsettled this year to assess whether Follen should change plans. In the next six months to a year we will explore whether we can offer different health insurance plans that are high-quality and also more affordable (for our employees and for us) than what we currently have through the UUA.

We would welcome another member to our small committee. We meet as needed and also participate in FHRAT.

FOLLEN LEGACY SOCIETY **Cas Groblewski and Ken Wright, Co-Chairs**

The Follen Legacy Society is part of the FHRAT Action Team. Membership is comprised of those individuals who have included Follen in their estate planning. The Legacy Society was formed in 2004 by the then Trustees, Peggy McHugh, Ken Wright, and Cas Groblewski, with assistance from the UUA, Reverend Lucinda Duncan, and the late Reverend Polly Guild, whose bequest was received in 2011 and which will be appreciated for many years and in many ways. Since 2004 more than 30 members and friends of the Follen Community have notified the Legacy Society that Follen is included in their estate plans. Members of the Legacy Society were honored this year at a special dinner on April 5.

We ask that you consider joining the Legacy Society to help ensure the viability of Follen for coming generations. Every gift or bequest, whether small or large, will help Follen remain the strong, vibrant, and caring community that it is today. The Legacy Society is overseen in a confidential manner by the Planned Giving Committee with support from the Parish Minister. Gifts that are received through a legacy are administered by the Trustees of the Follen Church 1980 Trust.

If you are interested in learning more about the Legacy Society or have not yet notified anyone of your plan to include Follen in your estate planning, please contact either Ken Wright, Cas Groblewski or Reverend Claire.

Several methods for a Follen legacy are:

1. A direct bequest, naming Follen in your will;
2. Naming Follen as the beneficiary of a retirement fund or a life insurance policy;
3. A Charitable Gift Annuity or a Deferred Gift Annuity;
4. A Charitable Remainder Trust.

Please consult an attorney or other professional for assistance in estate planning.

PASTORAL CARE ACTION TEAM **Linda Dacey, PCAT Chair**

Our focus this year has been on developing ways to provide caring support and opportunities for deeper connection and spiritual growth through stronger connections among subgroups of our team and by offering workshops to the entire team or congregation. We also created a set of operational procedures for support groups as we welcomed a new member, the Support Group for those with Elderly Parents. PCAT is composed of several groups, each of which benefits from exemplary leadership and members eager to support others. They are phenomenal individuals with whom to work and Maggie Herzig has agreed to chair in 2015-2016, the first time PCAT has ever had a planned succession!

CARING CONGREGATION COMMITTEE **Sharon Cerny, Chair**

This year the Caring Congregation Committee (CCC) included Harriet Peterson, vice-chair, Lu Shurlan, Margaret Micholet, Dottie Vacca, Sarah Richards, Kathy Hoben, Denise Dracup, Dominique Vo, Marlene Stone, Debra Zagaeski, and Susan Brefach. We offered several programs and services this year intended to make Follen a welcoming community to families of children with special needs.

Parent Support Group for Families with Children with Special Needs has continued to run on Sunday mornings from 8:30-10:00 under the facilitation of Margaret Micholet, Dottie Vacca and David Hobbie. David Hobbie has joined as a co-facilitator as Dottie Vacca transitions out. This is an open group that participants can use as they need. CCC sponsors essential child-care for parents in the support group; this childcare is

open to any Follen members that can use child care to Follen events during this time frame. Although the numbers using the child-care have continued to be low, it is not possible to run the parent support group without offering child-care.

Over the summer, CCC developed guidelines for support groups running at Follen and offers consultation to those starting and running such groups. In September, we sponsored a presentation by Lindsay Brennan, Director of Life Directions of New England, for the workshop group on Life Planning for Adult Children with Special Needs. This group continues to meet monthly as a peer-led support group for the members that participated in the workshop. Later in the fall, we were a sponsoring organization for a workshop at Temple Isaiah on "Getting Rid of the Stigma of Mental Illness." We shared our programs and curriculums with participants after the program, including our Behavioral Health Resource Guide. CCC has offered PCAT and RE the opportunity to attend workshops in May at Boston University on "Transforming Schools Culture through Collaborative and Positive Behavioral Interventions by Fran Kuehn," and "Understanding and Supporting the Complex Grief Experience of Caregivers of Adults with Dementia or Alzheimer's Disease," by Stephanie Wiadkowski.

A highlight of the year was the worship service on the "Transformative Power of Relationships" with personal points by Kathy Hoben and Alex Bromley. Similarly significant was our proposal for a "Fund to Assist Families with Special Needs Children." This fund will be administered under the Minister's Discretionary Fund and addresses the financial hardship experienced by Follen families that do not have the funds to pay for neuropsych testing, tutoring, advocate services, and so forth. The minister, in consultation with the DRE, will choose recipients, who will remain anonymous. CCC also was allowed to have a special collection at their mental health service in March where \$1675 was collected, allocated increased funds in next year's budget for this purpose, and received permission to hold an off-site fundraiser.

COVENANT GROUPS

Doug Durant and Margaret Micholet,
Co-chairs

This year the Covenant Group membership rose to 140, comprised of 13 groups and 21 leaders

and co-leaders. Covenant Group Leaders agreed on a schedule of fewer yearly meetings with different formats, which will give Leaders and Reverend Claire time and space to engage and stay connected. Covenant Group Operations Committee grew to 10 members. The CGO Chair and Co-Chair met regularly with Reverend Claire. The Session Writers Group produced sessions for ten months, many of which followed general themes provided by Rev. Claire. The sessions have met with much appreciation from CG members. Bravo Writers Group!

For the first time a new 'Introduction to Covenant Groups' class was offered mid-Fall to late-Winter. Meeting on a bi-monthly schedule for six sessions, this class was developed especially with new members in mind, both as a means of cultivating a continued interest in Covenant Groups and to help new members establish connections within the Follen Community. Also for the first time, an All-Follen Covenant Group Retreat was held in February. Fifty-five Follenites attended. Michael Grady from Cambridge Insight Meditation Center presented and developed themes around Sacred Listening and Interconnection. Breakout Covenant Groups were created mixing old and new members.

LAY MINISTRY

Maggie Herzig and John Dacey, Co-chairs

Our church year began with four continuing lay ministers: Bart Carr, Jackie Hawkinson, Maggie Herzig, and Greg Kotonias, one "veteran" rejoining after a year off, John Dacey, and four new lay ministers: Lynn Arenella, Beth Davenport, Rachel Hyde, and Sandy Stone. And of course, we had a new minister to train, inspire and guide us!

One of the goals set out last spring was to be open to the new minister's ideas and concept of lay ministry, a goal we have achieved with ease and pleasure. Claire supported us in our continuing efforts to provide empathic pastoral care to those in need. In our initial training, she emphasized the spiritual aspect of our role and taught us how to pray with those who might be open to prayer as part of their pastoral care. Claire gave an expanded role to lay ministers in the worship services, beyond leading Joys, Sorrows and Concerns, to include writing and offering pastoral prayers in our own style and our own voices. This change has been well received in the community. She has also helped us to

communicate the prayerful intention of that portion of the service and discourage sharing that is more suited to written news and announcements.

Two other goals were to enhance Follenites' understanding of what lay ministry is and to increase the visibility of lay ministers. Our first activity of the year was to write a two-page description of lay ministry for print and for the website. To enhance visibility, lay ministers have been joining the greeters in the vestibule. In addition, with Joe Turner's help, we have recently returned to an earlier tradition of posting photos of the lay ministers in the hallway downstairs.

We also set the goal of attending more fully to skill-building and training for ourselves, others involved in PCAT-related work, and all in the congregation. Toward those ends, we offered three workshops open to people involved with PCAT (which includes support group leaders and covenant group leaders). John Dacey offered a workshop on stress and one on spirituality and love. Beth Davenport offered an interactive workshop on using ideas from Internal Family Systems theory to help ourselves as individuals to move from feelings of ambivalence and conflict to being grounded in a more calm and centered self. John's workshop on stress was offered to the full community on May 8th. Beth's workshop will be offered to the full community next fall. Finally, we have woven skill building into our monthly meetings, most recently discussing readings on supporting people who are facing death.

When the year comes to a close, we will thank John Dacey and Greg Kotonias for their skillful service and whole heartedly welcome three new lay ministers: Carl Byers, Maureen Mulhern, and Joe Turner. Lynn Arenella will co-chair with Maggie Herzig.

SUPPORT GROUP FOR THOSE WITH ELDERLY PARENTS

***Amy Newmark and Laurel Carpenter,
Co-facilitators***

The Support Group for those with Elderly Parents (SGEP) held its first meeting in March of 2013, and has continued meeting monthly (including during the summer) through the current church year. In October of 2013, SGEP became an official sub-group of the Pastoral Care Action Team (PCAT). The purpose of the group is to provide a

supportive place for discussion of the challenges and emotions connected with being the child of an aging parent. For most of the first year, Amy Newmark served as the facilitator of the group and was joined by Laurel Carpenter as the co-facilitator in March of this year.

Since the first meeting, 21 people have attended at least one meeting, and monthly attendance varies between 4 and 10 people. Meetings alternate between Sunday mornings and evenings. During this time, the group has been a support for four members who lost a parent during the year, and provided supportive listening to all members who shared their situations related to the aging of their elderly parent or parents. Feedback from group members indicates that the support group is helping to address an important need in the congregation, and the plan is to continue with it for an indefinite period of time.

In late September, 2013, a number of group members participated in a focus group with Jennifer Gaudet, a researcher from Brandeis University, regarding opinions about factors in nursing care quality. Our group was given a gift of \$200 for our participation, which is being retained in a fund for a future use (possibly a speaker fee) related to the focus of our group.

Ongoing activities at this time, in addition to monthly meetings, include the development of a resource document which can be a starting place for group members and others at Follen who need information about senior resources, or resources for themselves as children/caregivers of elderly parents. Amy Newmark has been working on this, with help from Sandy Stone. Also, the group has identified possible speaker topics and representatives will be working over the summer with other interested PCAT members to put together a short series of programs for Fall 2014 (open to the whole church) around the topic of aging.

VOLUNTEER SERVICE NETWORK ***Amy Horsburgh and Caroline Jacobs***

Following a Personal Point kick-off last fall, we began managing Follen's Volunteer Service Network with the website *Lotsa Helping Hands*. Volunteer opportunities are entered into a task calendar, and volunteers sign up on-line. LHH sends automatic reminders to volunteers.

Between October and April we provided 75 meals and 19 rides to nine Follenites who had experienced some sort of crisis such as a fall, surgery or a change in life circumstances. We currently have 61 people who have indicated they would like to be part of the VSN and who have taken the next step of creating an account at LHH. The Minister and Lay Ministers have actively connected Follenites to the VSN, and feedback from all has been very positive. We extend our appreciation and gratitude to all the volunteers who have so willingly given their time and energy to help other members of the Follen community.

RELIGIOUS EDUCATION ACTION TEAM

Tara Fleming Caruso and Leslie Stebbins,
co-chairs

This was a wonderful and exciting year for the religious education programming at Follen Church. We were excited to greet our new settled minister, Claire Feingold Thoryn. We began the year with children and youth starting with their families in the worship service for the month of September; this helped all Follen members and friends the opportunity to get to see and know Claire.

The REAT (Religious Education Action Team) piloted a slightly different strategy to register families in the Sunday morning religious education programs and to sign up teachers. We offered a 4-week teaching commitment option and encouraged all participating families to support the cooperative RE education by signing on for two 4-week terms. Many individuals that had not previously taught in an RE classroom did so this year.

The REAT sent out a survey to families in March to help us evaluate this structure. The results indicate that the 4-week option is welcomed by most. Therefore the REAT will offer this structure for teacher sign up in the coming year.

The members of the Religious Education Action Team this year are: Tara Fleming Caruso (co-chair), Leslie Stebbins (co-chair), Ann Bobo, Cindy Carver, Ginna Johnson, Janet Lane, Jack Lloyd, Andrea Paquette, and Sally Richter.

The REAT has also started to create small satellite groups to work on specific areas of lifespan religious education programs at Follen. There is a

small adult programs group that has met to discuss next best steps and is working on a survey. There is a beginning teacher support and curriculum review group as well.

The grade 7&8 youth group had a fun year meeting together one time per month for activities within and outside of the Church.

The High School youth group (FUUY) saw a great influx of new youth attending on a regular basis. There are approximately 40 youth registered in the program with an average weekly attendance of 25-30. It has been a wonderful, energized group throughout the year. FUUY invited Boston Mobilization to present at a couple of meetings this year to facilitate discussions regarding racism and classism. The discussions have only just started. We plan to invite Boston Mobilization back in the coming year. Thank you to the volunteer youth advisors this year: Howie Bernstein, Andy Dixon and Greg Shenstone.

Emma Puka-Beals, the current FUUY youth program coordinator, will say goodbye at the end of this year. We are grateful to Emma for her two years of service. Hillary Collins-Gilpatrick (the new Follen ministerial intern) will take on the role of youth program coordinator in the 2014-15 year. Hillary joined the spring service trip to New Orleans this April and started to get to know the youth up close and personal. Welcome Hillary!

The grade 8 OWL (Our Whole Lives) collaboration with First Parish Lexington enjoyed another successful year. Thank you to the facilitators: Alison Greene, Alison Streit Baron, Megan Lancaster and Larry Roop. We plan to continue this collaboration in the coming year. Follen will be the host site next year.

On a final note we will be saying goodbye to our beloved Nursery Coordinator, Tasha Bonfanti Balsom, at the end of this Church year. Tasha is retiring from this position after serving for the past nine years as the nurturing presence in the Follen Nursery. We will miss you Tasha and hope to see you in worship on Sunday mornings!

Respectfully submitted, REAT

SOCIAL JUSTICE ACTION TEAM (SJAT)

Jean Foster and Stan Griffith, Co-Chairs

Social justice is important to us at Follen. It is the legacy of Rev. Follen who first founded a meeting house in East Lexington for abolitionists to gather. Every time we enter the front door we are reminded by his words that this congregation was created as a place for speaking out and acting against social injustice.

In September 2013 SJAT held a planning retreat with Rev. Claire at which we envisioned what social justice work might look like at Follen in five years. Based on the results of that retreat we started the year with these goals:

- Integrate social justice with other functions and team activities at Follen.
- Create opportunities for families to experience social justice activities together and engage children and youth in social justice work.
- Improve SJAT communications.
- Discover what issues are of interest and importance to the Follen community.
- Pursue an increase in funding for social justice activities more commensurate with the importance that Follen places on social justice as part of our church mission.

In October we called a congregational meeting to discuss *The Future of Social Justice at Follen* to learn what issues are most important to Follen. The forty-one participants reflected on their own experiences with social justice actions and expressed what issues concern them most today. For this group the most pressing issues were:

- Income inequality
- Accessibility/support for people with disabilities
- Climate change

With these goals in mind, this year we started 3 new initiatives, the Gun Violence Prevention Group which is working to support gun control legislation in Massachusetts, the Environmental Justice Task Force which is providing opportunities for the Follen congregation to talk about, and act to address, climate change, and a new project called Liff Up Lexington working with other Lexington faith organizations to aid homeless families being temporarily housed in an area motel.

We've tried to improve the way we communicate with the congregation making

sure information about social justice issues and actions at Follen and in the broader community are advertised. SJAT provided opportunities for families to participate in social justice education together by hosting movie nights. We brought in guest speakers for forums, and informational events. We worked with the Religious Education Action Team to help integrate social justice with the religious education curriculum.

To recognize and celebrate the many contributions of Sally and Dennis Brown to the social justice work of the Follen community over more than 30 years, SJAT established the *Sally & Dennis Brown Fund for Youth Social Justice Training*. The Brown Fund will support the training of young people from Follen in understanding social justice issues and the processes, techniques, and resources for effecting change, consistent with the principles of Unitarian Universalism. The Brown Fund Steering Committee, in consultation with the Religious Education Action Team, DRE Debra Zagaeski and Rev. Claire, will develop criteria and procedures for the selection of one or more grant recipients each year to participate in social justice educational programs, such as the UU College of Social Justice. Youth grant recipients will present a report on their training experience to the congregation.

The Brown Fund is supported by annual donations from members and friends of Follen. As of late April, generous Follenites have donated over \$3,100 to support the Fund. — The Brown Fund Steering Committee: Lisa Snellings, Nancy Alloway and Ann Schauffler.

In May SJAT is hosting an advocacy workshop at Follen to help those working on hunger and homelessness issues learn how to attack the root causes of these problems through legislative advocacy.

As you'll see from our sub-team and project reports below, it's been a busy but productive year for social justice at Follen!

BOOKS FOR CHELSEA

Sarah Richards

Follenites donated over 1300 books to the MGH Chelsea Health Center pediatric department this past year. It is wonderful to see the big smiles when the children are told they can take a book home!

ENVIRONMENTAL JUSTICE TASK FORCE (EJTF)

Jean Foster, Chair

Members: Kathy Vandiver, Kathy Spang, Jane Spickett, Janet Lane, Paul Rubin, Jennifer Logan, Laura Dickerson, Anne Engelhart, John Marshall, Marlene Stone, Nancy Mimno, Peter Steele

Over the years Follen has had projects and programs that fall under the category of environmental justice, such as our Green Sanctuary group and our participation in the Interfaith Garden. This year the Environmental Justice Task Force was formed primarily in response to 2013 UUA General Assembly Action of Immediate Witness to Consider Divestment from the Fossil Fuel Industry. The AIW called on all congregations to begin discussing divestment of their endowments from fossil fuels.

The EJTF saw this as an opportunity for Follen as a community to talk about the daunting topic of climate change in a safe and supportive atmosphere, and more importantly to explore how we can act as individuals and as a community to address climate change.

During the month of April, the team organized a series of events called Follen Celebrates the Earth, to help educate the community about climate change and get conversations started. The team started meeting with Follen leadership to ask them to start thinking about divesting our endowment from fossil fuels. The highlight was a forum on divestment with a panel that included Tim Brennan, Treasurer of the UUA.

INTERFAITH GARDEN

Janet Lane

Follen's Interfaith Garden volunteers joined with 14 other houses of worship to grow 1600 pounds of fresh, local produce for the Lexington Food Pantry. Follen supplied two volunteers twice a month throughout the growing season. People of all ages and abilities joined in.

GIVING TREE

Cindy Carver, Karen Gray Carruthers

The Giving Tree been run by Follen for over thirty years! It is a program that, during the winter holiday season, provides gifts and financial

assistance to those in need. This year, the Giving Tree was placed under the auspices of SJAT.

Follen Church receives requests from various organizations: Renewal House, a shelter for battered women in Boston where, sometimes, victims of domestic abuse are forced to leave their homes with just the clothes on their backs; and state agencies like the Department of Youth Services, where Follen Church's kindness can brighten the holiday season for a child that may have been forgotten. It is also an option under the Giving Tree in December to participate in the Kiva Microloan Initiative.

GUN VIOLENCE PREVENTION GROUP (GVPG)

Anne Grady, Chair

Members: Sally Cassells, Jane Current, Denise Dracup, Karen Edmonds, Stanley Griffith, Karen Longeteig, Mark Metzger, Linda Pagani, Paul Rubin, Ann Schauffler, and Don Snodgrass

SJAT formed the **Gun Violence Prevention Group (GVPG)** in September 2013 in response to a growing concern among Follen people about the tragedy of gun violence that kills 32,000 people in the US a year, including 2,700 children and teens. The GVPG explores ways to address gun violence by becoming informed, lobbying for stronger state and federal gun laws, participating in related activities, and educating the Follen Community about this important issue.

The Massachusetts Coalition to Prevent Gun Violence (MCPGV) has been an important resource for members of the GVPG. A consortium of 38 peace, religious, and anti-gun violence groups founded in February 2013 in response to the tragic shootings in Newtown, Connecticut, the Coalition has led the effort to get stronger gun laws enacted in Massachusetts. Follen's GVPG members have participated in these efforts by attending hearings, mounting a postcard signing campaign, and participating in an Action Day at the State House on Nov. 6 to meet with legislators.

Other GVPG activities this year included:

- For the anniversary of the Newtown killings on December 14, eight Follenites attended "Remembering Newtown" commemoration service and walk in Boston.
- On January 19, the GVPG hosted the screening of a video of Rep. Jay

Kaufman's Open House Forum on Guns, a panel discussion by representatives of both sides of the gun debate and Chief Corr of the Lexington Police. Three GVPG members participated in the church service that day. The event garnered six new members of the GVPG and a list of 15 people who wanted to be kept informed.

- At a special meeting of the SJAT on Feb. 23, with notice to the congregation, the ten SJAT members present unanimously approved the request by the GVPG for the Follen Church Society to become a member of the MCPGV and to use Follen's name in support of the GVPG work with the MCPGV to pass effective state and federal gun legislation.
- In April and May the GVPG planned and promoted the attendance at the Louis D. Brown Peace Institute Mother's Day Walk for Peace on May 11.
- The GVPG is pursuing contacts with gun violence prevention committees of other faith communities in Lexington, with the idea of jointly sponsoring events and sharing information.

IMMIGRATION TASK FORCE (ITF)

Kathy Spang and Catherine Rielly,
Co-Chairs

Members: Aruna Sharma, Anneliese Haase, Anne Engelhart, Kathy Hoben, Don Snodgrass, Karen Edmonds

Members attended the clergy breakfast hosted by the Boston Sanctuary Movement and a vigil for detainees at the Suffolk Detention center.

The ITF sent \$200 to Boston New Sanctuary Movement, in honor of Dennis Brown, and \$200 to LGBT Asylum Task Force in Worcester.

KIVA

Karen Gray Carruthers, Chair

Kiva's mission is to connect people, through lending, for the sake of alleviating poverty. Kiva empowers individuals to lend to an entrepreneur across the globe. By combining microfinance with the internet, Kiva is creating a global community of people connected through lending. Individual loans of \$25 are made to specific low-income entrepreneur across the globe. Kiva aggregates the loan funds from all contributing lenders. When the loans are paid

back, the funds are loaned out again to new entrepreneurs.

During our five years, Follen Church has loaned \$11,175 to deserving entrepreneurs. Our loans this year included financing:

- Mkwanakombo, a mother of four children from Kenya, to purchase oranges and mangoes for her fruit business.
- Jose, from El Salvador, to purchase two piglets to raise to support his family.
- Jorge, from the United States, to purchase a vending cart for his thriving hot dog business.
- Bemola, from India, to purchase parts for their bicycle shop.

We have loaned to individuals in 54 countries including those in Azerbaijan, Congo, India, Kyrgyzstan, Pakistan, Palestine and Haiti.

100% of every dollar lent on Kiva is used to fund loans. Kiva doesn't take a cut of the loans made on the website or charge interest. Instead, Kiva relies on donations from the lender community to cover operations and expand access to microfinance around the globe. For each \$25 loan we make, Follen Church donates \$3.75 to Kiva to support the organization.

The loans that have been repaid were returned to our Follen Community Church account and the funds are now re-loaned to new entrepreneurs. The Micro-loan Committee also provides individual donors who contributed to our Kiva Giving Tree at Christmas with a scenario of who they were matched with and how they can view the progress of their loan on the Kiva website. <http://www.kiva.org/> In addition, individual donations are included in our general fund. It is our hope that in the future we have a solid growing base that allows a continual global re-lending program and reaches out throughout the congregation.

NOLA GULF RELIEF

Ann Schaffler

Rebuilding work continues in New Orleans. This year marked our 16th and 17th service trips. Through the Center for Ethical Living and Social Justice Renewal (CELSJR), which is housed at the First UU Church of New Orleans, we secured lodging and were connected to the grass roots groups who connected us with our work sites.

- In November, members of Follen joined with members of UU Area Church in Sherborn, MA contributed volunteer labor to restore a century-old house on Bayou Road, which resulted in the family getting a Certificate of Occupancy in March.
- In April, 33 volunteers (including 24 youth) worked on 3 sites in the Freret neighborhood of NOLA. One site consisted of exterior prepping and painting of a shotgun house. The second involved demolition work and clean-up in a large single family house. In the third site, work on the first floor of a duplex house included the prepping and painting of 5 rooms, as well as framing and tiling of a bathtub and some plumbing.
- Fundraising for building material and other expenses continued with soup sales every Sunday from January 5 until April 13; the FUUY coffeehouse in late January; and Share the Plate in April, which brought in a generous \$2464.
- Kudos to Debra Zagaeski for her invaluable support and organizational skills; to David Anderson, Andy Dixon, and Howie and Beth Bernstein for their skills and project leadership; to Curt Troutman for his first-time enthusiasm and hard work; to Ed Jackson for being an inventive culinary specialist as well as a demolition crew leader; to Lori Moresco for her faithful participation; and to Hillary Collins-Gilpatrick for contributing her perspective and talents to the NOLA experience, with patience, thoughtfulness, and good humor--especially admirable for her first-time Follen event.
- Finally, heartfelt gratitude for the ongoing support from the FUUY parents and other members of the congregation for the social justice work we do in New Orleans.

PARTNER CHURCH COMMITTEE (PCC)

Kay Lamer, Chair, Sarah Richards, Vice Chair

Members: Debbie Bassett, Dennis Brown, Sally Brown, Sally Cassells, Sharon Cerny, Carolyn Crowell, Jackie Fesler, Barbara Meikle, Kathy Spang, Sandy Stone, Kathy Vandiver, Kim Vandiver

This year the PCC updated our policies and procedures by approving a Mission statement, revising our Covenant and Charter, creating a brochure, and redesigning our website. We also expanded our communication with our Partner Church to include emails, Follen newsletters, Christmas and Birthday cards and SKYPE conversations. Rev. Claire Feingold Thoryn and the committee celebrated Rev Jozsef Dimeny's 10 years of ministry in Alsófalvoszentmihály, and Csilla Dimeny's installation and election as President of the Transylvanian Unitarian Women's Federation.

Planning for 9 visitors from Alsófalvoszentmihály, Transylvania, Romania to visit Follen from Sept 5-Sept 14 is ongoing.

UUPCC Executive Director, Cathy Cordes, visited to update our Committee about the current mission of the UUPCC and best practices for Partner Church relationships, and we continued collaboration with local Partner Church Committees by hosting Winchester UUs.

PCC collected \$2691 from Share the Plate of which \$2400 supports the congregation of our Partner Church with the additional \$291 added to our visitor's fund, along with the proceeds from our soup sales. We also collected \$3600 for 12 Partner Church Scholarships to High School, College and/or Technical Schools. We donated a Transylvanian Hymnal and CD to Follen's Music Program. An annual Hungarian luncheon was held in to honor the 14 donors who have sponsored students for 10 years or more and to bid farewell to Sally and Dennis Brown.

SUNDAY'S BREAD

Mark Metzger

Follen continued to support the meals program through the proceeds of a Share-the-Plate and through monthly volunteers. Saturday's/Sunday's Bread made significant progress toward finding a new home, in anticipation of the closing next spring of its current location, St John the Evangelist.

The Sunday's Bread STP raised \$2,111. Approximately 30 Follenites participated in cooking and serving Sunday's Bread meals this year.

URBAN MINISTRY COORDINATING COMMITTEE (UMCC)

Tempe Goodhue, Co-Chair, Lisa Snellings, Co-Chair

Members: Sally Cassells, Dennis Brown, and Laura Maltby

This year the UU Urban Ministry Congregational Team hosted Renewal House families at the East Village Fair, welcomed UUUM Executive Director Rev. Catherine Senghas as guest preacher on Columbus Day weekend, helped to plan the Mother's Day Walk for Peace and subsidize transportation, and enlisted volunteers and provided financial support at a variety of UUUM events in Roxbury. Follenites generously supported the UUUM at the services on the Sunday before Thanksgiving, held in Lexington for the first time since 2006, with a wonderfully generous \$5,160.

WELCOMING CONGREGATION COORDINATING COMMITTEE (WCCC)

Jane Spickett, Chair

Members: Ann Schauffler, Char Morgan, Don Snodgrass, Jane Bausch, Karen Edmonds, Meg Muckenhoupt, Myra Morgan, Rachel Hyde, Sophie Morgan, Stan Griffith

- Created expanded, multigenerational and supportive committee
- Gave a powerful personal point addressing misinformation about bisexuality
- Improved LGBT visibility through signage and literature
- Collected Share-the-Plate donation of \$1750 to the LGBT Asylum Task Force
- Continued building support for Greater Boston PFLAG and attendance at Boston Pride
- Co-sponsored (with GBPFLAG) and hosted Jason & deMarco concert on their East Coast tour

WOMEN'S LUNCH PLACE

Ellen Adolph

Follen has supported the Women's Lunch Place for over 20 years, originally with donations of homemade meatballs and sauce and brownies, and more recently because health laws prevent us from sending prepared food, with donations from our Share the Plate offering. This year the

proceeds from the June 2013 Share the Plate were \$1750.

The Women's Lunch Place is a safe, welcoming day community for all self-identified women who are experiencing homelessness or poverty. The Women's Lunch Place strives to meet guests' most basic and immediate needs while coordinating and delivering critical support services designed to help women achieve greater stability and self-sufficiency whenever possible.

WORSHIP AND MUSIC ACTION TEAM (WMAT)

Bart Carr, Chair

General Purpose

The Worship and Music Action Team shall work with the minister to provide worship services that offer spiritual nourishment, inspiration, and intellectual challenge to the members of the church.

WMAT, in a collaborative spirit, worked closely with Rev. Claire to enhance the Sunday morning worship experience. Our work this year included:

- To help evaluate, update and organize the following elements of our worship service:
 - Chalice lighting
 - Pastoral prayers (with Lay Ministers)
 - Reflections
 - Guide for guest preachers
 - Order of service
- A decision to discontinue the Thanksgiving service at First Church, Roxbury, but to find other ways to honor and support the UU Urban Ministry. This is being done in collaboration with other Action Teams.
- Applause: We had an in-depth discussion on the place of applause during our worship services. Our perspectives on the issue were broadened through this process. It is important to allow the congregation to express genuine emotion while still being mindful of the sacred space.
- Offertory: We continue to discuss and make changes to the way the offering is collected, in an effort to honor generosity in a manner that fits our congregation.
- New Chalice: We identified a potter and have been working closely with her on a custom-designed chalice for our

sanctuary. We expect it to be ready for Ingathering 2014.

It has been an honor to have worked closely with Rev. Claire in her first year at Follen and to have engaged with her in the planning and design of worship and music.

WMAT Members: Rev. Claire Feingold Thoryn, Thomas Stumpf (Director of Music), Debra Zagaeski (Director of Religious Education), Bart Carr (chair), Suzie Byers, John Dacey, Adria Goodson, Bernie Harleston, Fred Johnson, Walter Leutz, Laura Maltby, Margaret Micholet, and Rev. Marie Tulin.

Respectfully submitted, Bart Carr (Chair)

FOLLEN COMMUNITY CHURCH ANNUAL PLAN 2014-15

During the past year, we have continued to fulfill additional key objectives in our Long-Term Plan. We completed perhaps our most vital one in November 2013 when we installed the Rev. Claire Feingold Thoryn as our settled minister. During that wonderful ceremony, Rev. Claire and we promised to “walk into the future in humility, unity and joy!” This coming church year, we will continue this journey and will *Reach In*, *Reach Out* and *Reach Up* to fulfill our worthy Stewardship and long-term goals.

Specifically, our congregation's generous pledges for the coming year bring us much closer to right-sizing staff compensation. They also enable us to increase funding in the FY2015 budget for social justice programs by nearly 47% to \$10,060. Another gratifying result is that we will welcome Ministerial Intern Hillary Collins-Gilpatrick for the 2014-2015 (and 2015-2016) church years. She is excited to join us and we are delighted to have her at Follen.

In 2014-2015, we pledge to co-minister with Rev. Claire to continue to fortify this church spiritually, culturally, financially and operationally. **Our overriding objective is to harness this community's many strengths to promote continued personal and spiritual growth for everyone at Follen.**

To achieve this, we will support programs and activities that enrich congregants' lives and support Follen's dedicated staff. We developed this Annual Plan in harmony with our continuing 2009 Long-Term Plan, which seeks to: (1) deepen our sense of community and spiritual life; (2) work for justice; (3) promote harmony with nature; and (4) build comprehensive Stewardship.

This Annual Plan reflects the overlapping nature of our work in several ways.

1. Goals that lay leaders and the Minister achieve together:

Initiatives related to our Shared Ministry:

- Manage our congregation's growth.
- Orient our newly called Ministerial Intern to Follen's needs and traditions.
- Refine the Ministerial Review Process.

Shared plans and objectives for all:

- Nurture and continually renew Follen's culture of hospitality including reinvigorating our congregation's role in welcoming newcomers. Publicize and expand the Host Program.
- Plan warm welcomes on Ingathering Sunday for both our new ministerial intern and for a delegation from our Partner Church in Transylvania.
- Plan for lodging, care, and activities for 10 days in September 2014 for the Partner Church visitors.
- Plan to celebrate our church's 175th anniversary beginning in January 2015.
- Fulfill our ongoing congregational commitment to LGBT people, their friends and families here and in the wider world.
- Develop awareness about and work as a congregation on income inequality.
- Further enhance the safety, convenience and aesthetics of our historic buildings and grounds.
- Invite all members and friends of Follen to nurture the growth and education of Follen's children and youth.
- Make it easier for the congregation to participate in pastoral work and in community-building, and social-justice actions and activities by improving communications via the Follen web site and media resources.

- Work to develop a Congregational Covenant and conflict-resolution processes.

Shared Plans for Governance:

- Train new lay leaders (PC). Schedule autumn retreat to develop needed skills and processes.
- Plan June 2015 session for succession from current Action Team chairs to incoming chairs (PC).
- Attend training sessions conducted by Communications team to learn (a) Follen's newly established Communications Policy and (b) how to use new web tools to engage the congregation in pastoral work and in community-building and social-justice actions and activities. (PB, PC, Action Teams, Communications group).
- Ask Action Teams to determine their communications needs and fulfill them in accord with Follen's new Communications Policy.
- Continue Long-Term Strategic Planning process to meet the "new realities" identified by Parish Board's task force. In shaping the Long-Term plan, include guidance provided in *The Almost Church Revitalized* (PC, PB, FHRAT).

2. Specific Plans for Action Teams:

Buildings & Grounds Action Team (BGAT)

- Structurally reinforce sanctuary roof (minimal cost).
- A/V upgrade: speakers, microphones etc.
- Paint exterior and repair and paint Community Center interior.
- Replant and provide landscape improvements.
- Start planning for better handicapped accessibility.
- Perform regular safety surveys of Follen's buildings and grounds.

Community and Hospitality Action Team (CHAT)

CHAT will become a more cohesive whole and will establish better communication across its subgroups by holding quarterly meetings (or meetings as needed) attended by CHAT's Program Council rep and CHAT subgroup chairs. CHAT's other goals are:

- CHAT's representative to Program Council will rotate among CHAT subgroups.
- Membership:
 - Reach out to newcomers through CHAT's Host Program and by expanding our Connections Program.
 - Increase awareness of ways to become involved with Follen Action Teams by hosting two Action Team Job Fairs in October and January.
 - Link January 2015 Action Team Job Fair to the Stewardship campaign.
- Membership Coordinator: Deepen connections with Stewardship.
- Communications:
 - Implement and maintain website redesign.
 - Train all Action Teams and staff with communications responsibilities to use the Follen style guides.
 - Continue developing social media use policies and best practices.
- Social Events:
 - Meet with SJAT to identify processes to enable better collaboration and cooperation.

Financial and Human Resources Action Team (FHRAT)

- Study options to determine how Follen can offer quality health insurance coverage that has more-affordable premiums for employees.
- Consider establishing an HR reserve fund to provide a buffer if unexpected increases occur in the cost of employee benefits.
- Develop full lifespan approach to Stewardship to encourage stronger ties with members. Reaching out to young adults will be a key focus.
- Work with Program Council and staff to explore how to expand Follen's capacity to provide care and support – both within and beyond our congregation.

Pastoral Care Action Team (PCAT)

Overall goals:

- Broaden recognition that pastoral care is something all at Follen can both receive and offer; conduct an October spiritual practice of care and kindness to begin this educational outreach.
- Increase collaboration among PCAT subcommittees, and with other Action Teams.
- Work closely with the Minister, DRE, and work with the Ministerial Intern.

Caring Congregation Committee:

- Facilitate support group for parents of children with special needs (childcare provided).
- Research expanding/augmenting the Minister's Discretionary Fund to support families who need services for their children with special needs.
- Extend collaboration with the spiritual, mental health and education resources existing in our larger community.
- Increase awareness of special needs as a social justice issue, including doing so in collaboration with SJAT.

Covenant Groups:

- Provide small group ministry and increase sacred listening.
- Offer a class to introduce Covenant Groups to folks new to Follen or new to Covenant Groups.
- Bring a speaker to Follen to lead off an all-Follen Covenant Group Retreat.

Lay Ministry:

- Provide timely support to those facing challenges, focusing on spiritual matters, and make referrals as appropriate (e.g., meal provision by VSN).
- Provide educational opportunities and skill-building workshops for our congregation; build skill and comfort among the lay ministers to write pastoral prayers.
- Collaborate with support group leaders as appropriate to plan events.

Support Group for Those with Elderly Parents:

- Facilitate a monthly support group for Follen members and friends who experience issues or challenges with one or more elderly parents.

- Continually update our directory of resources; sponsor a speaker on a topic related to issues and challenges of elderly parents.

Volunteer Service Network (VSN):

- Encourage more people to sign up as volunteers.
- Promote use of "Lotsa Helping Hands" website to organize needs and providers.
- Continue work with Lay Ministry.

Religious Education Action Team (REAT)

Goals for Lifespan Religious Education:

- Revitalize parents/caregivers involvement in Sunday morning religious education (REAT, DRE).
- Develop programs that foster intergenerational bonding including collaborating across age groups on social justice initiatives (REAT, SJAT, DRE).
- Recruit individuals for sub-REAT group to facilitate Adult Programs, increase awareness of these programs and collaborate with other ATs to develop new programs (REAT, DRE).
- Collaborate with Caring Congregation to develop and support more inclusive programming for families with special needs/concerns (REAT, DRE).
- Collaborate with other nearby RE programs on special events and programs as we do with First Parish Lexington on OWL (REAT, DRE).

Social Justice Action Team (SJAT)

Overall Goals

- Find new ways to connect with Follen's congregation to understand which social justice issues are important to our community, and create ways for congregants to participate in actions on those issues.
- Support Rev. Claire and members of Follen who want to start or participate in initiatives to promote education about or action on income inequality.
- Research new outside organizations to receive funding.
- Streamline procedures to make it easier for Follen members to launch social justice projects, programs, and simple activities.
- Create a process to review and renew or phase out SJAT programs when community interest turns elsewhere.

- Continue work with REAT to coordinate and support social justice activities with the RE and youth programs.
- Seek a substantial increase over several years in budgeted funding for SJAT activities that is more commensurate with the importance the congregation attaches to social justice. SJAT will again propose earmarking annual Christmas tree sales for social justice projects.
- Find ways to cooperate and collaborate with other Action Teams including WMAT and CHAT.

Books for Chelsea

- Collect and distribute books to pediatric patients at Chelsea Health Center.

Gun Violence Prevention Group (GVPG)

- Further educate the Follen Community about gun violence issues.
- Seek to increase the number of congregants on our committee, work on lobbying campaigns, and attend gun violence-prevention or peace events, such as the Mother's Day March for Peace.
- Continue working with the Massachusetts Coalition to Prevent Gun Violence to promote enactment of sensible gun safety laws in Massachusetts.
- Host someone to speak about gun violence issues.
- Coordinating with gun-violence prevention committees at other faith organizations in Lexington.
- Explore with the Lexington Police ways to promote local gun safety.

Environmental Justice Task Force (EJTF)

- Promote action and education about climate change, how to address it, and invite the congregation to participate in actions to address this issue.
- Host film nights and guest speakers on environmental topics.
- Promote participation in environmental-justice actions by partnering with local and national organizations such as 350.org.

Interfaith Garden

- Provide 2 volunteers from April to October to join the Lexington effort to

provide fresh local produce for Lexington Food Pantry.

- Janet Lane will coordinate volunteers and publicize the program.
- Follen will help fund the purchase of seeds and related materials.

Gulf Relief Initiative

- Organize two volunteer trips (November and April).
- Raise funds for travel and material expenses.
- Create a presentation about Follen's service work in New Orleans since April 2006.

Immigration Task Force: (ITF)

- Mobilize the Follen community to bear witness to the suffering of immigrant detainees held at local detention centers.
- Advocate for drivers' licenses for undocumented residents.
- Coordinate with First Parish-Lexington, which is forming an ITF, and invite Follen people to take First Parish's course, "Immigration as a Moral Issue."
- Collaborate with the Boston New Sanctuary Movement (BNSM) and our community partners, LGBT Asylum Support Task Force, Centro Presente and the Brazilian Immigrant Center.

Kiva

- Educate community on micro-loans.
- Expand and publicize the KIVA micro-loan project within Follen.
- Recruit additional committee members and participants.

Partner Church Committee (PCC)

- Engage with the congregation, lay leaders and minister of our Partner Church in Transylvania and collaborate with Massachusetts Partner Church committees and the UUPCC.
- Work with Religious Education AT (including FUUY) and Worship & Music AT (WMAT) to integrate the culture, music and spirit of our Partner Church.
- Raise money for visitors from our Partner Church to provide scholarships for Partner Church youths; host scholarship-donors appreciation luncheon.

- Consult with Program Council about additional UUPCC scholarship options.
- Review Mission Statement, committee covenant, and charter to accurately reflect the current wishes of the committee.
- Plan with Rev. Claire and Program Council for a 10-day September visit by nine members of our Partner Church Congregation from Alsófelseszentmihály, Transylvania.
- Recruit more committee members and participants.

Sunday's Bread

- Provide support through Share the Plate and volunteering to cook and serve meals.
- Help Saturday's/Sunday's Bread organization transition to a new location.

Urban Ministry Congregational Team (UMCT)

- Develop new team membership.
- Increase engagement with the UU Urban Ministry through volunteer activity, including Jericho Road Roxbury, the UUUM's new pro bono service grant program.
- Develop educational programming to encourage support for UUUM activities and raise awareness of the issues confronting the communities it serves.

Welcoming Congregation Coordinating Committee (WCCC)

- Make the mission and the work of the WCCC more visible throughout Follen; serve as a resource for Action Teams and church members and friends.
- Invite more Follen people to participate in WCCC work.
- Continue educating everyone about forces that threaten the wellbeing of LGBT people.
- Support and participate in organizations in the wider community that advocate for individual and institutional justice for LGBT people such as Greater Boston PFLAG (Parents, Families and Friends of Lesbians and Gays), the LGBT Asylum Task Force, and the annual Boston Pride parade.

Women's Lunch Place

- Make annual Share-the-Plate donation to Women's Lunch Place.

Worship & Music Action Team (WMAT)

Overall Goals:

- Integrate our new ministerial intern into Follen.
- Institute smoother planning for Rev. Claire's Sundays off.
- Consider alternative worship services at times other than Sunday mornings.
- Support development of a "Building Your Own Theology" class (with REAT).
- Offer a program on the intersection of theology and music.
- Collaborate with SJAT and REAT to offer anti-oppression/anti-racism/diversity workshop(s).

FINANCIAL REPORTS

AUDITOR'S REPORT

I have completed the Auditor's examination of the church's books, after reviewing expense records for February 2014 and performing an in-depth audit of all records for March 2014. I find that the books are kept in accord with generally accepted accounting principles and I consider the financial records of Follen Church to be well maintained and organized. The financial statements included in the Annual Report present an accurate picture of Follen's finances.

*Respectfully submitted,
Ellen Adolph*

TRUSTEES REPORT

David Weissburg, Christopher Farnham, and David Hobbie, Trustees

Follen's invested resources, comprising several separate categories, represent resources dedicated in the past—whether near or distant—to serve the enduring interests of our church. The trustees have a duty of stewardship over this gift from the past to the future. They are responsible for ensuring that short-term needs do not make undue claims on long-term resources; that funds are invested prudently; that spending from endowment is for appropriate purposes; and that this generation of Follenites follows its

predecessors' tradition of mindfulness toward the needs of the future.

Resources Held in Trust for Follen

There are two categories of resources held in trust for Follen:

1. Endowment Funds

Endowments are pools of resources meant to provide a steady stream of funding for some long-term purpose through returns on invested funds. Annual disbursements from an endowment fund are generally set at a rate that is equal to or less than the long-term inflation-adjusted expected return of the invested resources. When earnings exceed spending, reinvested earnings expand the endowment and promise greater future earnings. Spending in excess of earnings, conversely, implies erosion of the invested principal and a loss in permanent earning power. Rather than ramping disbursements sharply up and down as earnings shift with market conditions, it is generally considered good practice to maintain annual spending from endowment at a level that matches prudent estimates of average long-term earnings. Often a target payout rate of between 4 and 5 percent is considered appropriate—lower if the goal is to augment the invested principal, higher if a steady or shrinking endowment is envisaged.

Follen has two endowment funds, both established and managed under the terms of The Follen Church 1980 Trust:

- The *Programs Fund*, the largest category of resources held in trust, is dedicated to earning investment returns to support the general programs and activities of the church. As of the close of 2013 the Program Fund amounted to \$580,034.65 and was invested in six different mutual funds. During 2013, contributions of \$800 were made to the Programs Fund. In the Fall of 2013 \$7,500.00 was disbursed from this fund to Follen Church for the FY 2013 Fiscal Year. The Trustees approved a request for \$15,000.00 for the 2014-2015 Fiscal Year. The actual amount that ultimately will be disbursed is, as of this writing, unconfirmed.
- The *Heritage Fund*, unlike the more general Programs Fund, has the narrower mission of providing enduring support for the preservation, restoration, and improvement

of Follen's buildings, equipment, facilities and grounds. The Heritage Fund—allocated across seven separate investments—stood at \$262,835.71 at the close of 2013. During this year, contributions of \$400 were made to the Heritage Fund. No disbursements were made or requested by Follen Church for this fund.

2. Special Funds

Follen also has four funds devoted to specific purposes:

- The *Louise Curtis Fund* (\$21,621.83 at the end of 2013) was established to honor Louise Curtis and is dedicated to supporting Follen's music program by covering expenditure over and above what the regular operating budget permits. It may not be used to cover salaries or the purchase of musical scores. During 2013 contributions totaling \$710 were made to this Fund.
- The *Stoneham Organ Fund* (\$31,758.47 at the end of 2013) is dedicated exclusively to paying the expenses of one or more organ concerts per year to be performed on the Stoneham organ. The terms of this fund also permit loans to pay for organ repairs and maintenance, but any such loans must be repaid.
- The *Barbara Marshman Fund* (\$14,188.72 at the end of 2013) is pledged to the support of Follen's religious education programs.
- The *Beals Fund* (\$65,875.12 at the end of 2013), like the Heritage Fund, is to be used for the repair and maintenance of the church buildings.

As of 12/31/13, the resources of the Louise Curtis, Stoneham Organ, and Barbara Marshman Funds were invested in a single Fidelity account comprised of six mutual funds. In 2014, a high priority for the Trustees will be to separate these three Funds into their own individual Fidelity accounts in order to make sure donations and investment income is accurately allocated to the respective funds.

Considering Divestment from Fossil Fuel Industry

In 2013 and into this current year (2014), there has been an ongoing discussion of climate change and realigning our financial resources to avoid investing in companies that have a negative global impact. This summer, at the UU Association General Assembly an "Action of Immediate Witness" will be put before members for approval.

This action is titled, "Consider Divestment from the Fossil Fuel Industry." Discussion and review of this action by Follen congregants has naturally included consideration of changes

to our own endowment. Follen's Trustees are engaged in this discussion and are educating themselves on fossil fuel divestment as it relates to modest endowments like ours. We will participate in these discussions going forward and adjust our investment strategies and goals in accordance with our duties of stewardship.

Strengthen Follen's Endowment by Joining The Legacy Society

Follen's endowment is relatively small for a church of its size, and the Trustees continue to feel that endowment growth is an important long-term goal. Given endowment spending, substantial

growth is unlikely to come from investment returns alone. For instance, for the Program Fund in particular, it is our expectation that long-term investment returns have a good probability of offsetting spending outflows, and thus maintaining the purchasing power of that Fund, but such returns are unlikely to contribute much to that Fund's inflation-adjusted growth over time. To shore up Follen's financial underpinnings for future decades, we encourage Follen's members to consider joining The Legacy Society. This society is comprised of those who have included Follen in their estate planning. Legacy Society members have named Follen in their wills, or as a beneficiary of a trust, annuity or life insurance policy.

David Weissburg, Christopher Farnham, and David Hobbie, Trustees

**Follen Church Society
2013 Trustees' Report
Fund Balances**

	12/31/2013	12/31/12	12/31/2011	12/31/2010	12/31/2009
PROGRAMS FUND (1980 Trust):					
Northeast Investors (NTHX):	\$	\$	\$	\$	\$
Mass Investors-A (MFS) (MITTX):	202,288.77	153,364.36	128,711.44	131,108.50	117,659.00
Templeton Mutual Shares (MUTHX):			97,222.43	98,698.45	88,316.85
American Century Select (TWCIX):			51,268.19	50,552.55	44,118.00
Spartan Total Market Index Fund (FSTVX)	61,486.87	145,541.69	71,356.74	66,273.50	
Spartan U.S. Bond Index (FSITX)	131,144.02	118,005.09	7,400.73	8,435.74	
Spartan International Index (FSIIX)	116,227.95	8,773.49	26,491.20	25,294.20	
Fidelity Large Cap Core Enhanced (FLCEX)	40,858.92	30,425.58	35,913.69	17,090.98	
Fidelity Cash Reserves (FDRXX)	28,028.12	24,175.52	141,162.36	117,094.42	107,117.00
Total Fidelity	377,745.88	326,921.37	432,586.48	411,703.70	369,682.85
TOTAL PROGRAMS FUND:	\$ 580,034.65	\$ 480,285.73	\$ 432,586.48	\$ 411,703.70	\$ 369,682.85
HERITAGE FUND (1980 Trust):					
Calvert Social Investment (CSIFX):	\$	\$	\$	\$	\$
Fidelity Equity Income (FEQIX)	3,443.77	2,936.56	2,649.52	2,565.44	2,313.00
Spartan U.S. Bond Index (FBIDX) (FSITX)	2,846.95	2,229.66	1,901.91	1,995.29	
Fidelity Puritan (FPURX)	30,347.80	24,384.33			
Fidelity Balanced (FBALX)	83,508.99	69,045.39	85,204.45	84,636.09	
Fidelity Cash Reserves (FDRXX)	71,809.08	59,593.56	52,785.12	51,912.88	
Total Fidelity (Account #Z67-044512)	23,960.85	16,283.86	36,370.25	23,906.60	
Brandywine (BRWIX):	212,473.67	171,536.80	176,261.73	162,450.86	129,350.00
Total	46,918.27	45,684.73	43,407.31	51,699.46	42,687.00
TOTAL HERITAGE FUND:	\$ 262,835.71	\$ 220,158.09	\$ 222,318.56	\$ 216,715.76	\$ 174,350.00
OTHER CHURCH FUNDS*					
Louise Curtis Music Fund:	\$	\$	\$	\$	\$
Stoneham Organ Fund:	21,621.83	18,817.68	17,126.93	16,742.07	13,404.00
B. Marshman RE Fund:	31,758.47	27,639.70	25,156.29	24,591.00	19,688.00
Total	14,188.72	12,348.58	11,239.07	10,986.51	8,796.00
TOTAL OTHER CHURCH FUNDS	\$ 67,569.02	\$ 58,805.96	\$ 107,351.79	\$ 52,319.58	\$ 41,888.00
BEALS FUND					
Fidelity Large Cap Stock (FLCSX)	\$	\$	\$	\$	\$
Spartan U.S. Bond Index (FBIDX)	38,731.73	32,261.65			
Cash	21,059.71	17,697.77			
Total	6,083.68	4,333.16			
Total Fidelity Account (#Z69-674966)	\$ 65,875.12	\$ 54,292.58			
GRAND TOTAL:	\$ 976,314.50	\$ 813,542.36	\$ 762,256.83	\$ 680,739.04	\$ 587,921.00
* "Other Church Funds" includes:					
Fidelity Equity Income II (FEQTX):	\$	\$	\$	\$	\$
Fidelity Growth & Income (FGRIX):	7,914.61	4,950.01	7,412.59	7,622.33	6,713.13
Fidelity Balanced (FBALX):	17,550.37	14,564.87	5,010.56	4,942.04	4,313.36
Sound Shore (SSHFX):	8,125.57	5,741.43	12,900.86	12,687.66	11,152.94
Dreyfus Lifetime Growth & Income (DGII):			12,920.40	13,771.18	12,280.99
Fidelity Total Bond	17,406.03	13,304.06	5,208.67	5,050.54	4,572.40
Cash Reserves (FDRXX):	12,362.99	12,361.79	595.90	595.82	595.48
Other Cash Holdings	4,209.45	7,883.80	63,302.81	7,650.01	2,259.71
Total:	\$ 67,569.02	\$ 58,805.96	\$ 107,351.79	\$ 52,319.58	\$ 41,888.01

Follen Church Society Social Justice Giving FY2011-2014

- Follen congregants' donations for social justice causes in addition to social justice spending planned through the operating budget •

	2010-11	2011-12	2012-13	2013-14
MONETARY DONATIONS				
Jewish Alliance for Law & Social Action, Inc.: individual collection for gun violence prevention coalition				\$ 300
KIVA Micro-Loans: micro-loans to individual entrepreneurs around the world, including the U.S.	\$ 1,215	\$ 2,240	\$ 3,001	\$ 3,635
UUA: support for Standing on the Side of Love Campaign (FY11-12); assistance to UU ministers (FY14)	\$ 2,384	\$ 908		\$ 2,014
Charlie Cards: individual collection to provide MBTA transit cards to people in transitional housing at the Quality Inn in Lexington (ongoing at time of publication)				\$ 425
LGBT Asylum Task Force in Worcester: sanctuary for people persecuted due to their sexual orientation Worship service collections - Share the Plate			\$ 2,785	\$ 1,919
Saturday's/Sunday's Bread: serves free hot meals to people in need in Boston every weekend day Worship service collections - Share the Plate (sent \$750 from operating in FY11)		\$ 2,311	\$ 2,209	\$ 2,111
Brazilian Immigrant Center: advocates for the labor and immigration rights of the Brazilian and Latino/a immigrant communities Worship service collections - Share the Plate			\$ 1,536	\$ 1,893
Centro Presente: provides services to assist in the self-determination and self-sufficiency of the Latin American immigrant community of Massachusetts Worship service collection - Share the Plate		\$ 1,674		
Hispanic Black Gay Coalition: advocates for policy, social and cultural change to increase the safety, health, resources and inclusion of the black and Latino LGBTQ community Worship service collection - Share the Plate		\$ 1,565		
Louis D. Brown Peace Institute: serves as a center of healing, teaching and learning for families and communities dealing with murder, trauma, grief and loss Share the Plate worship service collection in FY13; individual collection in FY14 (still ongoing when this report was printed)				
Women's Lunch Place: a daytime refuge in the Back Bay for women who are poor and homeless Worship service collections - Share the Plate (sent \$500 from operating in FY11)		\$ 1,231	\$ 1,750	
Lexington Interfaith Food Pantry and Garden: pantry provides non-perishable food year-round and garden provides fresh produce in season to Lexington families in need of assistance Worship service collection - "Gifts of Gold" \$ 585				
Collection taken during town-wide interfaith Thanksgiving service held at Follen \$ 2,662				
UU Urban Ministry: seeks to unite communities and transform individuals through programs in education, service, and advocacy from its base in Roxbury Worship service collections - Special collection FY11, Share the Plate FY12-14 \$ 3,150		\$ 4,250	\$ 2,689	\$ 5,160
<i>Note: in FY11 and FY13, UU Society of Wellesley Hills joined Follen at services in Roxbury. FY11 collection totaled \$6300, FY13 totaled \$5377. Figures shown are 50% of totals estimated from Follen congregants.</i>				

Gulf Relief: provides supplies, equipment and travel assistance for teams of youth and adult volunteers to help repair the damage from Hurricane Katrina									
Miscellaneous donations:	\$	20	\$	100	\$	250	\$	450	
Fundraisers - FUUY coffee house, soup sales:	\$	2,724	\$	2,735	\$	2,746	\$	2,612	
Worship service collections - Share the Plate:									
Trip participants' fees, including airfare, housing costs (note: airfare did not go through Follen in FY13):	\$	12,773	\$	13,061	\$	5,960	\$	18,751	
Partner Church: general financial assistance and student educational scholarships for people in Alsöfelseszentmihály, Transylvania, Romania									
Student scholarships:	\$	5,600	\$	4,600	\$	4,700	\$	3,600	
Additional miscellaneous donations:									
Fundraisers - soup and note card sales (not final for current year):	\$	1,984	\$	1,660	\$	2,763	\$	1,550	
Worship service collections - Special collection FY11, Share the Plate FY12-14:	\$	1,457	\$	3,703	\$	2,639	\$	2,625	
Monetary Donations - Yearly Totals	\$	34,554	\$	44,074	\$	39,692	\$	52,602	
DONATIONS OF GOODS									
Lexington Food Pantry:	Groceries	Groceries	Groceries	Groceries	Groceries	Groceries	Groceries	Groceries	
More Than Words Bookstore & Café:	Books	Books	Books	Books	Books	Books	Books	Books	
Guests of Women's Lunch Place and Sunday's Bread:								Toiletries	
Reach Out and Read, a program to provide books to children in Chelsea:	Books	Books	Books	Books	Books	Books	Books	Books	
Children and youth in Afghanistan, Kazakhstan, Paraguay, guests of Rosie's Place in Boston:	Knitwear	Knitwear	Knitwear	Knitwear	Knitwear	Knitwear	Knitwear	Knitwear	
Holiday gifts to Renewal House, Dept. of Children and Families, Dept. of Youth Services and Hildebrand Family Self-Help Center (estimated value):	\$2,190	\$2,025	\$2,025	\$2,025	\$1,550	\$1,550	\$2,925	\$2,925	
DONATIONS OF SPACE									
Alcoholics Anonymous meetings: reduced rent for two weekly, year-round groups:	52wks/yr	52wks/yr	52wks/yr	52wks/yr	52wks/yr	52wks/yr	52wks/yr	52wks/yr	
English as a Second Language classes: Lexington Community Education adult program:	~22wks/yr	~22wks/yr	~22wks/yr	~22wks/yr	~22wks/yr	~22wks/yr	~22wks/yr	~22wks/yr	
SUPPORT FOR FOLLEN CONGREGANTS									
FUUY / GA: financial assistance for Follen youth attending the UUA General Assembly in June 2014								\$	655
Brown Social Justice Youth Training Fund: financial support for the training of Follen youth in understanding social justice issues and effecting change								\$	3,145
Minister's Discretionary Fund: financial assistance primarily for Follen congregants, including \$1675 collected during worship on March 23, 2014 to provide services for children with special needs	\$	7,750	\$	8,895	\$	8,265	\$	11,843	
Follen members, friends and employees give countless hours of time and effort for social justice each year, engaged in work and activities such as these: knitting; tutoring; gardening; researching; making soup; attending hearings; preparing and serving meals; joining in peace walks and vigils; delivering books, gifts, and groceries; meeting, planning, organizing and publicizing; tiling, framing, painting, plumbing in New Orleans. Their efforts are invaluable.									

Follen Church Society

Profit & Loss [Budget Analysis]

July 2013 through June 2014

4/30/2014
9:04:17 AM

	Selected Period	Budgeted	\$ Difference	% Difference
4-0000	Income			
4-1000	Total Operating Revenue			
4-1050	Annual Pledging	\$352,313	\$394,970	\$42,657 (10.8%)
4-1100	Plate Collections & Donations	\$10,922	\$8,800	\$2,122 24.1%
4-1150	Rental of Halls	\$29,763	\$34,000	\$4,237 (12.5%)
4-1255	Nextel Res Transf / AT&T Rent	\$23,000	\$23,000	\$0 0.0%
4-1300	Endowment Income/Interest	\$147	\$15,500	\$15,353 (99.1%)
4-1310	Interest on Checking & Savings	\$642	\$1,000	\$358 (35.8%)
4-1350	R.E. Registration Fees	\$6,180	\$5,000	\$1,180 23.6%
	Total Total Operating Revenue	\$422,968	\$482,270	\$59,302 (12.3%)
4-8000	Special Events Revenues			
4-8510	East Village Fair	\$22,768	\$18,650	\$4,118 22.1%
4-8520	Christmas Tree Sales	\$13,124	\$16,000	\$2,876 (18.0%)
4-8530	Service Auction	\$13,000	\$13,000	\$0 0.0%
4-8540	Operetta	\$3,356	\$5,800	\$2,444 (42.1%)
	Total Special Events Revenues	\$52,248	\$53,450	\$1,202 (2.2%)
4-9000	All Other Revenue Sources	\$350	\$202	\$148 73.3%
	Total Income	\$475,566	\$535,922	\$60,357 (11.3%)
6-0000	Total Operating Disbursements			
6-1000	Office Operations			
6-1050	Administrator Salary	\$42,481	\$50,976	\$8,495 (16.7%)
6-1060	Administrator Expenses	\$500	\$500	\$0 0.0%
6-1075	Other Admin. Salary	\$14,749	\$18,436	\$3,687 (20.0%)
6-1100	Postage	\$916	\$1,400	\$484 (34.6%)
6-1110	Office Supplies	\$3,494	\$4,400	\$906 (20.6%)
6-1130	Office Printing	\$5,567	\$5,800	\$233 (4.0%)
6-1150	Telephone & Network	\$1,882	\$2,500	\$618 (24.7%)
6-1160	Equipment Reserve	\$1,667	\$2,000	\$333 (16.7%)
	Total Office Operations	\$71,256	\$86,012	\$14,756 (17.2%)
6-1900	FY2014 Non Budgeted Expenses	\$160	\$1,885	\$1,725 (91.5%)
6-2000	Buildings & Grounds			
6-2050	Sexton Salary	\$13,586	\$16,303	\$2,717 (16.7%)
6-2075	Other Plant Salary & Wages	\$675	\$1,300	\$625 (48.1%)
6-2090	Insurance	\$9,253	\$10,200	\$948 (9.3%)
6-2110	B & G Maintenance & Supplies	\$11,426	\$12,000	\$574 (4.8%)
6-2130	Utilities	\$10,964	\$12,000	\$1,036 (8.6%)
6-2200	Building Reserve	\$14,167	\$17,000	\$2,833 (16.7%)
6-2240	Audio Visual	\$56	\$1,000	\$944 (94.4%)
6-2265	SMAF	\$0	\$300	\$300 (100.0%)
	Total Buildings & Grounds	\$60,126	\$70,103	\$9,977 (14.2%)
6-3000	Ministry			
6-3050	Parish Minister Salary	\$75,718	\$90,969	\$15,251 (16.8%)
6-3055	Parish Minister's SECA	\$5,736	\$6,885	\$1,149 (16.7%)
6-3060	Parish Minister Expenses	\$6,477	\$7,200	\$723 (10.0%)
6-3070	Ministerial Coverage	\$500	\$500	\$0 0.0%
	Total Ministry	\$88,431	\$105,554	\$17,123 (16.2%)
6-4000	Religious Education			
6-4050	Director of RE Salary	\$41,666	\$49,999	\$8,333 (16.7%)
6-4060	Director of R.E. Expenses	\$5,319	\$5,319	\$0 0.0%
6-4075	Other R.E. Salary & Wages	\$1,544	\$2,737	\$1,193 (43.6%)
6-4300	R.E. Supplies & Expenses	\$6,871	\$7,700	\$829 (10.8%)
6-4350	Child Care	\$2,277	\$3,111	\$834 (26.8%)
6-4355	Paid Lead Teacher	\$0	\$600	\$600 (100.0%)
6-4360	Youth Coordinator	\$1,756	\$7,226	\$5,470 (75.7%)
	Total Religious Education	\$59,433	\$76,692	\$17,259 (22.5%)
6-5000	Other Programs			
6-5050	Finance/Fund Drive	\$2,088	\$1,900	\$188 9.9%
6-5060	Human Resources	\$0	\$100	\$100 (100.0%)
6-5100	Newcomers & Membership	\$1,061	\$1,100	\$39 (3.6%)
6-5125	Membership Coordinator	\$10,561	\$14,803	\$4,242 (28.7%)
6-5130	Memb Coord Prof Exp	\$1,011	\$1,480	\$469 (31.7%)
6-5155	Web Site Consultant	\$730	\$700	\$30 4.3%

Follen Church Society

Profit & Loss [Budget Analysis]

July 2013 through June 2014

4/30/2014
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		Selected Period	Budgeted	\$ Difference	% Difference
6-5350	Social Events / Hospitality	\$1,387	\$1,600	\$213	(13.3%)
6-5375	Welcoming Congregation	\$0	\$240	\$240	(100.0%)
6-5552	Urban Ministry	\$891	\$1,740	\$850	(48.8%)
6-5553	NOLA	\$2,940	\$2,940	\$0	0.0%
6-5554	Interfaith Garden	\$100	\$100	\$0	0.0%
6-5555	Partner Church	\$600	\$600	\$0	0.0%
6-5556	Kiva Microbanking initiative	\$240	\$240	\$0	0.0%
6-5557	Non-Follen Initiatives	\$100	\$100	\$0	0.0%
6-5558	New Initiatives	\$258	\$500	\$242	(48.5%)
6-5559	Immigration as a Moral Issue	\$0	\$400	\$400	(100.0%)
6-5600	Worship Supplies	\$499	\$300	\$199	66.3%
6-5605	Guest Speakers - Worship	\$1,200	\$1,000	\$200	20.0%
6-5611	Spiritual Retreat	\$0	\$125	\$125	(100.0%)
6-5615	Piano/Organ Maintenance	\$833	\$1,000	\$167	(16.7%)
6-5616	Instrumentalists	\$1,400	\$1,200	\$200	16.7%
6-5617	Music Library	\$127	\$600	\$473	(78.8%)
6-5618	A/V Equipment for Taping	\$0	\$200	\$200	(100.0%)
6-5620	Lay Ministry	\$448	\$450	\$2	(0.4%)
6-5625	Covenant Groups	\$390	\$400	\$10	(2.4%)
6-5650	Parish Board/Program Council	\$82	\$300	\$218	(72.7%)
6-5660	Staff Retreat	\$306	\$300	\$6	2.1%
6-5750	Trustees/Legacy Society	\$305	\$400	\$95	(23.8%)
6-5780	Caring Congregation	\$508	\$2,000	\$1,492	(74.6%)
6-5785	Volunteer Service Network	\$0	\$100	\$100	(100.0%)
6-5850	Lay Leadership Training	\$285	\$500	\$215	(43.0%)
	Total Other Programs	\$28,350	\$37,418	\$9,068	(24.2%)
6-6000	Music				
6-6050	Director of Music Salary	\$43,416	\$52,099	\$8,683	(16.7%)
6-6060	Director of Music Expenses	\$0	\$100	\$100	(100.0%)
6-6075	Asst to the Music Director	\$390	\$1,495	\$1,105	(73.9%)
6-6080	Junior Choir Director	\$3,790	\$4,737	\$947	(20.0%)
6-6085	Soloists	\$14,771	\$17,153	\$2,382	(13.9%)
6-6090	Accompanists Sr & Jr Choir	\$4,457	\$5,516	\$1,059	(19.2%)
	Total Music	\$66,823	\$81,100	\$14,277	(17.6%)
6-7000	Employee Benefits				
6-7800	Payroll Taxes	\$14,283	\$17,348	\$3,065	(17.7%)
6-7910	Health Insurance	\$5,412	\$6,142	\$730	(11.9%)
6-7920	Employee Life Insurance	\$1,626	\$2,138	\$512	(23.9%)
6-7940	Retirement Plan Contr	\$21,524	\$25,762	\$4,238	(16.5%)
6-7999	Payroll Service Fees	\$1,905	\$2,250	\$345	(15.3%)
	Total Employee Benefits	\$44,749	\$53,640	\$8,891	(16.6%)
6-8000	Special Events Expenses				
6-8540	Operetta	\$12	\$0	\$12	NA
	Total Special Events Expenses	\$12	\$0	\$12	NA
6-9000	Denominational Affairs				
6-9050	UUA Fair Share Pledge	\$14,016	\$17,520	\$3,504	(20.0%)
6-9100	Mass Bay District Pledge	\$4,438	\$5,548	\$1,110	(20.0%)
6-9160	Urban Ministry & LICA Memb Fee	\$250	\$450	\$200	(44.4%)
	Total Denominational Affairs	\$18,704	\$23,518	\$4,814	(20.5%)
	Total Total Operating Disbursements	\$438,044	\$535,922	\$97,878	(18.3%)
	Operating Profit	\$37,521	\$0	\$37,521	NA
8-0000	Other Income				
9-0000	Other Expenses				
	Net Profit / (Loss)	\$37,521	\$0	\$37,521	NA

Follen Church Society

755 Massachusetts Avenue
Lexington, MA 02420

Balance Sheet

As of April 2014

4/30/2014
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1-0000	Assets			
1-1000	Current Assets			
1-1100	Cash On Hand			
1-1101	Business Checking-Citizens	\$30,107		
1-1102	Business Money Market-Citizens	\$61,821		
1-1106	Brookline Money Market	\$190,342		
	Total Cash On Hand		<u>\$282,270</u>	
	Total Current Assets			\$282,270
1-2500	Prepaid Expenses			\$587
	Total Assets			<u>\$282,857</u>
2-0000	Liabilities			
2-1000	Current Liabilities			
2-1400	Payroll Withholding			
2-1430	FMed/FSoc Payable	\$197		
2-1470	Employee Health Withheld	(\$205)		
2-1480	Employee Dental Withheld	(\$220)		
2-1490	Emp Life/ Disability Withheld	(\$298)		
	Total Payroll Withholding		<u>(\$526)</u>	
	Total Current Liabilities			<u>(\$526)</u>
	Total Liabilities			(\$526)
3-0000	Fund Surplus			
3-1000	Cumulative Surplus			\$25,550
3-1100	Operating Reserve			\$55,300
3-1200	Sprint Nextel / AT&T Reserve			\$39,819
3-1300	Min Transition Reserve Fund			\$11,950
3-1400	Minister's Initiative Fund			\$5,000
3-2000	Transfer Funds			\$390
3-2050	Future Year Pledge			\$20,824
3-2060	Future Year Rent			\$1,115
3-3000	Current Surplus			\$37,521
3-4000	Miscellaneous Funds			
3-4105	Minister's Disc Fund Transfers	\$50		
3-4120	Building Reserve Fund	\$33,616		
3-4130	Equipment Reserve Fund	\$4,386		
3-4150	Auction Reserve Fund	\$14,354		
3-4170	Partner Church Fund	\$13,612		
3-4180	Landscape Bricks	\$1,052		
3-4185	New Orleans Trip Fund	\$11,670		
3-4190	Flower Fund	\$987		
3-4195	Support Group-Elderly Parents	\$200		
3-4200	Antiquities Reserve Fund	\$3,535		
3-4300	Organ & Piano Maintenance Fund	\$2,847		
3-4500	Growth & Membership Fund	\$483		
3-4602	CHAT Events Reserve Fund	(\$5,074)		
3-4603	FUUY Fund	\$655		
3-4604	Seder and Shabbat Dinner Fund	\$397		
3-4607	Brown Youth SJ Training Fund	\$3,145		
	Total Miscellaneous Funds		<u>\$85,914</u>	
	Total Fund Surplus			<u>\$283,383</u>
	Total Liability & Equity			<u>\$282,857</u>

Follen Church Society FY15 Proposed Budget

Acct #		2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Actual	FY14 Budget	FY15 Proposed Budget
	REVENUE						
	<i>Annual Pledging Gross</i>	\$ 335,152	\$ 340,000	\$ 339,000	\$ 382,950	\$ 407,186	\$ 436,329
4-1050	Annual Pledging Net	\$ 322,272	\$ 340,389	\$ 340,248	\$ 373,841	\$ 394,970	\$ 423,239
4-1100	Plate Collections & Donations	\$ 12,672	\$ 11,942	\$ 8,765	\$ 9,436	\$ 8,800	\$ 11,000
4-1150	Rental of Halls	\$ 35,061	\$ 33,688	\$ 34,709	\$ 30,704	\$ 34,000	\$ 31,000
4-1250	Sprint Nextel Rent / AT&T Rent	\$ 41,206	\$ 42,855	\$ 44,569	\$ 23,002	\$ 23,000	\$ 30,900
4-1300	Total Endowment Income	\$ 120	\$ 76	\$ 20,187	\$ 7,645	\$ 15,500	\$ 15,500
4-1310	Interest on Checking & Savings	\$ 3,278	\$ 1,368	\$ 979	\$ 857	\$ 1,000	\$ 1,000
4-1350	R.E. Registration Fees	\$ 5,550	\$ 4,680	\$ 4,660	\$ 4,900	\$ 5,000	\$ 6,000
4-8510	East Village Fair	\$ 14,755	\$ 19,621	\$ 19,099	\$ 18,839	\$ 18,650	\$ 18,650
4-8520	Christmas Tree Sale	\$ 14,885	\$ 16,923	\$ 16,955	\$ 16,222	\$ 16,000	\$ 16,000
4-8530	Goods & Services Auction	\$ 7,500	\$ 13,207	\$ 9,000	\$ 14,012	\$ 13,000	\$ 15,000
4-8540	Operetta	\$ 5,845	\$ 5,195	\$ 3,688	\$ 5,948	\$ 5,800	\$ 5,800
4-9000	All other revenue sources	\$ 38	\$ 2,964	\$ 781	\$ 876	\$ 202	\$ 340
4-9100	Transfer from Cumulative Surplus	\$ 15,000	\$ 20,000	\$ 25,000	\$ 8,000		
4-9100	Transfers from other funds	\$ 12,550	\$ 3,775	\$ 5,757	\$ 18,938		
	UUA Internship Grant						\$ 5,000
	Total Receipts	\$ 490,732	\$ 516,683	\$ 534,397	\$ 533,220	\$ 535,922	\$ 579,429
	EXPENSES						
	Office Operations						
6-1050	Church Administrator Salary	\$ 44,827	\$ 47,068	\$ 48,480	\$ 48,965	\$ 50,434	\$ 51,947
6-1060	Administrator Expenses (combined)	\$ 500	\$ 457	\$ 425	\$ 500	\$ 500	\$ 500
6-1075	Communications, Min, RE Admin Sal	\$ 20,225	\$ 17,189	\$ 17,705	\$ 16,930	\$ 18,240	\$ 18,513
6-1100	Postage	\$ 1,077	\$ 1,190	\$ 1,304	\$ 1,053	\$ 1,400	\$ 1,200
6-1110	Office Supplies & Expenses	\$ 4,366	\$ 3,386	\$ 4,485	\$ 4,161	\$ 4,400	\$ 4,400
6-1130	Printing	\$ 5,378	\$ 5,783	\$ 6,173	\$ 5,297	\$ 5,800	\$ 6,100
6-1150	Telephone and Internet	\$ 2,620	\$ 3,369	\$ 1,941	\$ 1,816	\$ 2,500	\$ 2,200
6-1160	Equipment reserve	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 2,000	\$ 1,000
	Total Office Operations	\$ 79,993	\$ 79,442	\$ 81,513	\$ 79,722	\$ 85,273	\$ 85,860

Follen Church Society FY15 Proposed Budget

4/22/2014

Acct #		2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Actual	FY14 Budget	FY15 Proposed Budget
	Buildings and Grounds						
6-2050	Sexton Salary	\$ 15,048	\$ 15,349	\$ 13,724	\$ 15,813	\$ 16,129	\$ 18,629
6-2075	Other sextons	\$ 1,655	\$ 2,195	\$ 1,910	\$ 1,050	\$ 1,300	\$ 1,300
6-2090	Insurance	\$ 9,936	\$ 9,841	\$ 10,463	\$ 10,784	\$ 10,200	\$ 11,500
6-2110	Maintenance and Supplies	\$ 10,934	\$ 10,018	\$ 10,488	\$ 11,392	\$ 12,000	\$ 10,500
6-2130	Utilities	\$ 13,018	\$ 12,886	\$ 11,675	\$ 11,682	\$ 12,000	\$ 12,000
6-2200	Building Reserve	\$ 10,000	\$ 13,370	\$ 17,000	\$ 17,000	\$ 17,000	\$ 20,000
6-2240	Audio Visual			\$ 307	\$ 1,049	\$ 1,000	\$ 5,000
6-2260	Landscaping		\$ 990	\$ 661	\$ 2,132	\$ -	\$ 1,000
6-2265	SMAF (Space Mgmt & Furnishings)	\$ 41	\$ -	\$ 191	\$ 16	\$ 300	\$ 300
	Total Buildings and Grounds	\$ 60,632	\$ 64,649	\$ 66,419	\$ 70,918	\$ 69,929	\$ 80,229
	Ministry						
6-3050	Parish Minister Salary	\$ 85,289	\$ 86,995	\$ 81,401	\$ 89,841	\$ 90,000	\$ 91,350
6-3055	Minister's SECA (in lieu of FICA)	\$ 6,525	\$ 6,655	\$ 6,743	\$ 6,875	\$ 6,885	\$ 6,988
6-3060	Parish Minister Prof Exp	\$ 3,397	\$ 3,239	\$ 5,615	\$ 11,669	\$ 7,200	\$ 7,308
6-3070	Min Coverage Summer			\$ 500	\$ -	\$ 500	\$ 500
6-3075	Student Minister Salary						\$ 9,000
6-3077	Student Minister Prof Exp + Computer						\$ 2,500
	Total Ministry	\$ 99,210	\$ 96,889	\$ 94,259	\$ 108,385	\$ 104,585	\$ 117,646
	Religious Education						
6-4050	Director of RE Salary	\$ 40,167	\$ 49,646	\$ 51,632	\$ 51,148	\$ 49,466	\$ 51,445
6-4060	DRE Prof. Expenses	\$ 3,961	\$ 4,000	\$ 4,000	\$ 6,160	\$ 5,319	\$ 5,319
6-4075	Sunday Support Aide	\$ 1,430	\$ 2,261	\$ 2,434	\$ 2,534	\$ 2,737	\$ 2,778
6-4300	RE Program Supplies & Expenses	\$ 5,930	\$ 7,821	\$ 8,090	\$ 8,728	\$ 7,700	\$ 8,500
6-4350	Child Care - Supervisor and Assts.	\$ 2,922	\$ 3,007	\$ 2,947	\$ 3,144	\$ 3,110	\$ 3,144
6-4355	Paid Lead Teacher					\$ 600	\$ 600
6-4360	Youth Coordinator	\$ 6,480	\$ 6,218	\$ 7,018	\$ 3,144	\$ 7,226	\$ 7,334
	Total Religious Education	\$ 60,890	\$ 72,953	\$ 76,121	\$ 74,858	\$ 76,158	\$ 79,120
	Other Action Teams & Nom Com						
6-5050	Stewardship exp, incl Fund Drive	\$ 900	\$ 902	\$ 2,898	\$ 2,580	\$ 1,900	\$ 1,900
6-5060	Human Resources	\$ -	\$ 25	\$ 95	\$ 75	\$ 100	\$ 100
6-5750	Legacy Society	\$ 553	\$ -	\$ -	\$ -	\$ 400	\$ 400
	Total Financial & HR Action Team	\$ 1,453	\$ 927	\$ 2,993	\$ 2,655	\$ 2,400	\$ 2,400

Follen Church Society FY15 Proposed Budget

4/22/2014

Acct #		2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Actual	FY14 Budget	FY15 Proposed Budget
6-5100	Newcomers & Membership	\$ 1,393	\$ 1,550	\$ 1,017	\$ 1,376	\$ 1,100	\$ 1,520
6-5125	Membership Coordinator	\$ 3,546	\$ 10,004	\$ 11,070	\$ 12,975	\$ 14,803	\$ 15,025
6-5130	Membership Coordinator Prof Exp			\$ 211	\$ 120	\$ 1,480	\$ 540
6-5150	Welcoming Congregation	\$ 200	\$ 150	\$ -	\$ -	\$ -	\$ -
6-5155	Web Site Consultant			\$ 700	\$ 700	\$ 700	\$ 1,000
6-5350	Social Events/Hospitality	\$ 1,714	\$ 1,807	\$ 1,094	\$ 822	\$ 1,600	\$ 2,000
	Total CHAT	\$ 6,853	\$ 13,511	\$ 14,092	\$ 15,993	\$ 19,683	\$ 20,085
6-5545	Donation to Sunday's Bread	\$ 500	\$ 750	\$ -	\$ -	\$ -	\$ -
6-5550	Women's Lunch Place	\$ 484	\$ 500	\$ -	\$ -	\$ -	\$ -
6-5150	Welcoming Congregation Coord Comm				\$ 40	\$ 240	\$ 440
6-5552	Urban Ministry	\$ 1,800	\$ 1,450	\$ 1,450	\$ 1,450	\$ 1,740	\$ 1,740
6-5553	NOLA	\$ 1,800	\$ 2,450	\$ 2,450	\$ 2,450	\$ 2,940	\$ 3,290
6-5554	Interfaith Garden	\$ 600	\$ -	\$ 113	\$ 75	\$ 100	\$ 100
6-5555	Partner Church			\$ 500	\$ 500	\$ 600	\$ 950
6-5556	Kiva Microbanking initiative	\$ -	\$ 82	\$ 200	\$ 106	\$ 240	\$ 240
6-5557	Outside initiative - UU Mass Action	\$ -	\$ 1,267	\$ 100	\$ 100	\$ 100	\$ 100
6-5558	New initiatives / New projects	\$ -	\$ 251	\$ 550	\$ 87	\$ 500	\$ 500
6-5559	Immigration as a Moral Issue					\$ 400	\$ 400
	Books for Chelsea						\$ 250
	Gun Violence Prevention Group						\$ 400
	Environmental Justice Action Team						\$ 400
	Income Inequality						\$ 250
	Humanitarian Emergency Response Fund						\$ 1,000
	Total Social Justice Action Team	\$ 5,184	\$ 6,750	\$ 5,363	\$ 4,808	\$ 6,860	\$ 10,060
6-5555	Partner Church	\$ 500	\$ 500				
6-5600	Worship Supplies	\$ 258	\$ 381	\$ 477	\$ 342	\$ 300	\$ 400
6-5605	Guest Speakers	\$ 1,250	\$ 1,300	\$ 1,100	\$ 1,125	\$ 1,000	\$ 1,900
6-5610	UUUM Service / Anti-Racism Training	\$ 2,107	\$ 1,905	\$ 1,775	\$ 1,612		\$ 2,000
6-5611	Spiritual Retreat		\$ -	\$ 24	\$ 111	\$ 125	\$ 125
6-5615	Music Piano/Organ Maint	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
6-5616	Music Instrumentalists	\$ 1,150	\$ 1,000	\$ 1,200	\$ 1,100	\$ 1,200	\$ 1,500
6-5617	Music Library	\$ 784	\$ 45	\$ 226	\$ 417	\$ 600	\$ 600
6-5618	AVSupplies for Taping	\$ 1,205		\$ -	\$ 200	\$ 200	\$ 200
	Total Worship & Music Action Team	\$ 8,254	\$ 6,131	\$ 5,802	\$ 5,907	\$ 4,425	\$ 7,725

Follen Church Society FY15 Proposed Budget

Acct #	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Actual	FY14 Budget	FY15 Proposed Budget
Denominational Affairs						
6-9050 UUA Fair Share Pledge	\$ 14,896	\$ 15,736	\$ 16,356	\$ 16,878	\$ 17,520	\$ 17,220
6-9100 Mass Bay District Pledge	\$ 5,054	\$ 5,339	\$ 5,358	\$ 5,529	\$ 5,548	\$ 5,453
6-9160 Urban Ministry & LICA	\$ 450	\$ 450	\$ 350	\$ 450	\$ 450	\$ 450
Total Denominational Affairs	\$ 20,400	\$ 21,525	\$ 22,064	\$ 22,857	\$ 23,518	\$ 23,123
6-1900 Contingencies [Non-budgeted Exp]	\$ 5,488	\$ 5,385	\$ 256	\$ -	\$ 1,885	\$ 1,776
Total Expenses	\$ 472,977	\$ 499,359	\$ 502,354	\$ 533,220	\$ 535,923	\$ 579,429
Total Revenue	\$ 490,732	\$ 516,683	\$ 534,397	\$ 533,220	\$ 535,922	\$ 579,429
Surplus/(Deficit)	\$ 17,755	\$ 17,324	\$ 32,043	\$ 0	\$ (0)	\$ 0
Net after End-of-Year Transfers by PC						
<i>Personnel Expense Analysis</i>						
Total Personnel costs	\$ 354,170	\$ 382,045	\$ 385,448	\$ 403,382	\$ 411,535	\$ 439,375
Total Non-personnel costs	\$ 118,807	\$ 117,314	\$ 116,906	\$ 129,838	\$ 124,388	\$ 140,054
Personnel costs as % of total exp	74.9%	76.5%	76.7%	75.7%	76.8%	75.8%
Non-pers costs as % of total exp	25.1%	23.5%	23.3%	24.3%	23.2%	24.2%