

# Annual Report

## 2023



Second Congregational Meeting House Society

Unitarian Universalist

Nantucket, MA

**January, 2024**

### Board of Trustees at end of 2023

	<b><u>Term Ends</u></b>
Susan Richards, <i>President</i> .....	January 2024
Barbara Elder, <i>Clerk</i> .....	January 2024
Paul Stewart, <i>Treasurer</i> .....	January 2024
Randi Allfather.....	January 2025
Carol Benchley.....	January 2026
Suse Robinson .....	January 2026
Lora Stewart.....	January 2024
Rev. Dr. Althea Smith, non-voting.....	ex officio

Elected Trustee terms are three years, except for the Treasurer whose term is one year.  
Elected Trustees, including the Treasurer, are elected by the congregation at the Annual Meeting.  
The Board elects its other officers annually from among its members.

### Staff at end of 2023

Rev. Althea Smith, *Minister*  
Rev. Ted Anderson, *Minister Emeritus*  
Nigel Goss, *Music Director*  
Raymond Haskell, *Business Manager*  
Leyah Jensen, *Children & Youth Program Director*  
Bridgett Bloise-Smith, *Sexton*

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## 2023 Annual Meeting Minutes via Zoom

**Board of Trustees Present:** President Loretta Middleton, Vice-President Carl Borchert, Clerk Susan Richards, Treasurer Paul Stewart, Trustees - Kathy Stevens, Kristina Strand, Lora Stewart, Randi Allfather

The meeting started immediately following a shortened Sunday service. The Chalice stayed lit for this meeting.

1. **Meeting Called to Order** at 11:35am by President Loretta Middleton
2. **Opening blessing and words** by Rev Linda Simmons
3. **Quorum of 25+ voting members** determined by Clerk Susan Richards
4. **Special recognition of Gary Langley** - Jack Weinhold spoke eloquently about Gary's many varied contributions to the congregation and the island! Thank you Gary for all you have brought to our Congregation, our Meeting House, and our Island!
5. **Approval of minutes of 2022 Annual Meetings** - Clerk Susan Richards MOVED and Lora Stewart seconded that we approve the minutes of the 1/30/2022 Annual Congregational Meeting along with the 8/14/2022 Special Congregational Meeting with name correction made by Jim Sulzer in the Parsonage update in the 8/14/2022 meeting (from Andy Scott to Andy Bennett - person who is helping do much of the maintenance work on the Parsonage)

Minutes to both Congregational meetings unanimously approved with name change in Parsonage report....

6. **Constitutional Amendments** - Clerk Susan Richards MOVED and Lora Stewart seconded that we approve the constitutional amendments illustrated and explained in the accompanying document (two-thirds vote required)

Discussion - Steeplejacking - could wording be changed to not including a vote? Emphasis on the process of becoming a member rather than being voted in? Meet and greet committee - Trial period? Extensive - Change the motion so that the President can meet with Prospective members.

Jim Sulzer MOVED and Polly Miller seconded that we remove the phrase "and has been duly invited by vote of Board of Trustees" from Article 4, paragraph 4. Unanimously approved with 1 abstention

Susan Richards MOVED and Val Hall seconded to accept Congregational Meeting approved amendments as amended to:

Article 3 paragraph 1 (add "six to" before the phrase "nine elected members")

Article 4 paragraph 4 (add Board President and "to discuss membership" phrase)

Article 5 last paragraph (add “four to” before the phrase “six persons”)

Article 7 paragraph 1 (change quorum from 25 members to 30% of certified members)

Article 10 paragraph 2 (add “the” before the first instance of “Church”).

**Final version of amended Article 4 - Membership** - Any person eighteen years of age or older who is in sympathy with the purpose of this Church, has read and accepts the covenant of the Church, has met with the Minister or, in the Minister’s extended absence, the Board President, to discuss membership, and has agreed to support the Church to the extent of that person’s ability, shall be welcomed to membership on signing the Membership Book. All members are expected to support the Church and to participate in its activities.

Discussion and suggestions in regards to amended Article 4:

1. A 'New UU' class with the minister or Board president and several other members of the congregation to discuss membership.
2. A one year waiting period between becoming a member and the ability to vote at congregational meetings.

## 7. **2023 Annual Budget**

Treasurer Paul Stewart MOVED and Val Hall seconded that we follow the unanimous recommendations of our Finance Committee and our Board of Trustees and approve the 2023 ‘Unlikely To Exceed’ budget on page 4 of the budget document on our website (also on page 43 of our 2022 Annual Report), which is a summary of the details on the pages following."

Discussion - of “the unknown”

Fewer ministers available for congregations in need.

Column AK in Budget - Unlikely to exceed” (Total of non-transition and transition columns) -

This entire budget is not as predictable as in prior years - best scenario..we will have an Interim minister and spend all of this budget. Have included the full cost of a full time business manager without any of the potential income that a position - Questions about minister transitions costs - UUA recommends \$10,000 -

VOTE called for and taken - Motion to accept the 2023 Budget passed unanimously

8. **Officers and Nominating Committee** Carl Borchert, Vice President thanked all outgoing Trustees - Loretta Middleton, Susan Berman, and Kathy Stevens, and SCPF Directors Angus Macleod, Mary Bergman, Marion Roland Conley, and Gary Langley. Thank you all for your service!

- a. Peter Richards moved and Vall Hall seconded the nomination of Paul Stewart as Treasurer - VOTE taken and Paul was unanimously voted in for another 1 year term.
  - b. Peter Richards moved and Susan Fernald seconded the nomination of Trustees Carol Benchley, Barbara Elder and Suse Robinson. VOTE taken and all three were unanimously voted in for 3 year terms.
  - c. Returning SCPF Directors - Christine Sanford -President, Chris Hanson -Treasurer, Polly Miller- Secretary, Bob Middleton, and Susan Hochwald.
  - d. Peter Richards moved and Susan Farrell seconded the nomination of Ann Perkins, Peter Richards, and Jim Sulzer to return for another year's term on the Nominating Committee - Voted on and Approved unanimously
9. **Celebrating Rev Linda** - President Loretta Middleton spoke eloquently in celebration of Rev. Linda's ministry. Thank you, Rev. Linda for everything you have brought to our Congregation and Island Community!
10. **Full-time Interim Minister** - Carl moved and Paul seconded to Affirm the Board's recommendation to try for a full-time interim minister
- Discussion - it will be challenging but we would really like the help and guidance - Interim ministers usually start August 1st - the UUA has a "draft" of congregations that need a minister and ministers needs - the whole Board is working on this - PT interim minister? Not possible for us on Nantucket? What to do with the Parsonage - Interim minister is "pre-fired" - The process is important... send any names of potential ministers (contract/guest speakers) to the Board.
- VOTED on and approved unanimously
11. **Chalice Extinguished** and meeting adjourned by President Loretta Middleton at 1:14pm

## [August 20, 2023 Special Congregation Meeting Summary](#)

Meeting Called to Order and Opening Words by President Susan Richards

### **Transitional Minister Search Task Force Update, Lora Stewart, Trustee**

Update to Congregational Meeting August 20, 2023

Task Force Formed 2/25/2023

Lora Stewart, Chair, Randi Allfather, Barbara Elder and Paul Stewart

First meeting: 2/28/2028 - Split up tasks and spent all of March and one week in April preparing our "packet" for the UUA jobs board for an interim minister search. We also crafted a special section for ministers in search on our website.

There is, currently, a very significant shortage of ministers in search for parish ministry so our expectations going into search were low. To our surprise, we received two interim candidates from the west coast whom we interviewed and vetted through their references. We said "yes" to both as they were interesting, had helpful skills and were acceptable to us. However, neither one proved to be a "match". Most years, the UUA Transitions Office holds a second round of matches, but, this year, they moved all churches and ministers still in search to the "contract ministers" jobs board where 100 (out of 1000 UU churches in the country) were listed as needing a minister. Since then, we have had

two more candidates express interest themselves. After contacting them it was clear that one was only interested in very part-time and the other was only interested in doing a remote ministry from Tennessee so we decided against going any further with them. Once we were listed on the “contract” jobs board, we also followed up with two non-Unitarian ministers who had expressed interest in us before we began our search for an Interim minister in covenant with the UUA. One had bought a house in France and moved there. The other was more local and our needs were not a good match with his stated goals for his next ministry so those two candidates were eliminated.

Rev. Keith Kron from the UUA Transitions Office has been very supportive of us. He sent us one candidate that we liked very much and with whom we worked very hard for much of July to try to agree on a contract. Ultimately, the time she had available to be on the island and the difficulty with arranging twice monthly travel as well as settling on benefits made it clear that it was going to be too difficult to come up with a satisfactory solution for her or us. We learned that we really want someone who can be on island and who can get to know us and help us do some self-discernment in preparation for our next settled minister. It was worth waiting for that minister to be available. We have been exploring some alternatives going forward. Following our recent visit from our last interim minister, David Horst, he presented an idea for starting what he called “The Nantucket Residency”; a program where a series of ministers would come and do some work for our congregation including some Sunday worship services, guiding our self-evaluation and planning for the future and, possibly, also work on a project of their own for several months during their stay. We are intrigued with the idea and will “keep it in our back pocket”. In the meantime, the Transitions Office has encouraged another candidate to apply and we have completed an initial, very positive interview. We’ll be reporting to the congregation as things unfold. It has been a somewhat frustrating “roller coaster”, but the intrepid Task Force is determined to keep moving forward.

### **Financial Update, Paul Stewart, Treasurer BOT Treasurers Report to Congregational Meeting August 20, 2023**

We’ve had quite a roller coaster ride since early August 2022 when our beloved Reverend Linda Simmons announced her resignation.

We approved our first unbalanced budget in my tenure as your Treasurer.

We bid Rev. Linda and Gary a fond farewell.

We hired a full time Business Manager.

Two of our long-term renters ended their terms with us, but two new ones have come to call this their home.

Some congregants have died or resigned or moved away; but some others have come to call this their home.

As Lora reported, we’ve put a lot of work into searching for a new Interim or Transitional minister to help us thrive and attract a new minister in 2025.

We’ve done a lot of work on the Parsonage to get it ready for our next minister. Jim will talk more about that.

Through all this year of changes and uncertainty, we have survived and, indeed, thrived.

We have lay-led services which are interesting and attractive.

We have kept going with our usual annual events like:

The yard sale

The 4th of July

The auction

We’ve had lots of Coffee and Tea and Crafting and Saturday Socials and Friday Fun.

So now to the numbers.

Page 1 is what I report to the Board of Trustees each month. This shows good progress. It also shows us spending some of the money we had saved up in the Parsonage Capital Maintenance Fund.

Page 2 is the nominal and real value of our reserves over time, up to the end of June (our half-year).

From that I can say we're doing fine on our finances.

We'll see more information on all this as 2023 draws to a close and as the 2024 annual budget is developed.

With that, I'll throw the floor open to questions.

### **Lay Led Committee Update, Representative, Susan Richards, President BOT**

The Lay Led Committee consists of Kat Robinson Grieder, Val Hall, Susan Berman, Ann Scott, Joanne Polster and myself. This committee is typically charged with creating and leading one service per month, mostly the 4th Sunday. In addition, over the last couple of years we have been filling in services when Rev Linda had health issues that required her taking some time to recover.

Rev Linda's final service before stepping down from her ministry was on February 19th of this year and since then the Lay Led Committee has been meeting regularly, typically twice a month, to work together to create weekly services.

In the 6 months since Rev Linda stepped down plus the two services we led before she stepped down, the Lay Led Committee has created and led 26 services with themes ranging from "The Soul of an Octopus" to "Nantucket's Maritime Traditions" to A "Jazz Service", to a service devoted to Dorothy Day to a recent service featuring the Beatles and much more... If you have an idea and/or would like to join our committee, please feel free to contact one of us...

Special thanks to Kathy Stevens who joined the Lay Led Committee right after Rev Linda left and stayed on temporarily, giving our group a jolt of energy and creativity when we needed it.

I am so proud to be a part of this creative group of hardworking Congregational members. We've really come together to keep our services coming...

For the remaining months of 2023 we are ready to create and lead more services but are also ready to return to a more supportive role should we find a minister!

### **Building and Grounds, Parsonage update – Paul**

### **UU General Assembly Report, Kat Robinson Grieder and Jan Ellsworth, Representatives**

General Assembly 2023

June 21-25, 2023

Kat and I share our gratitude to Nantucket UUs for electing us as your delegates.

A bit about the Unitarian Universalist Association (UUA):

UU Website – [UUA.org](http://UUA.org)

The mission of the UUA, in part, is to equip congregations for health and vitality, to support and train lay and professional leaders, and to advance UU values in the world.

The UUA is the central organization of the UU religious movement in the USA, which began in 1961.

There is 1000+ UU congregations, all committed to the seven principles as set down in the current bylaws.



Each of the UU congregations:

Choose to join the UUA and pay a membership fee

Are autonomous.

Congregational leaders set their own priorities and choose their own ministers.

Vote for the leaders of the UUA, who oversee the central staff and resources

The UUA

The elected president is the chief executive of the UUA and is elected at GA every few years

(usually 6)

Trains ministers

Publishes books and UU World magazine

Provides religious education materials and curricula

Offers shared services

Coordinates social justice activities

The 2023 general assembly was a hybrid meeting – online and in person – and was held in Pittsburgh PA

GA uses a democratic process for all voting.

All attendees can participate in workshops, connect with other UUS from across the country, make policy for the UUA and worship together.

Anyone may attend but only delegates can vote

Congregations must certify annually with the UUA before they can send delegates to GA. The number of delegates each congregation may send depends on the number of members you have – Nantucket can send two delegates.

What we voted on at GA 2023:

A new President was elected – Dr Sofia Betancourt – she received 61% of the vote (2320/110)

The UUCEF will immediately divest from all fossil fuel companies, including the industries and financial institutions that support fossil fuel projects, and companies that build or own oil fields, companies involved in hydrocarbon exploration and the building of hydrocarbon exploration projects, fossil fuel pipeline builders and owners, and all fossil fuel financiers, including but not limited to all companies that were named in the above

The UUCEF will return an equivalent value of the securities that were invested in fossil fuels as of June 30, 2022, or the total value of securities invested in fossil fuels at the time of the 2023 General Assembly of the UUA, whichever is greater, in the form of reparations to the Indigenous tribes and communities who are the ancestral and continued stewards of this land, Black and Brown communities (prioritizing these communities which are working class) and refugees of prior and ongoing wars fueled by the fossil fuel industry, all parties of which have endured the ongoing violence of racist-capitalist systems which sought to actively destroy them.

Article II Revisions: Resources re Article II

<https://www.uua.org/uuagovernance/committees/article-ii-study-commission/resources>

The current UUA bylaws were last revised in 1985 with an update that added the 8th principle in 2017.

The goal of the current planned update is to ensure that UUs are living into a future of great need and ethical, moral, and spiritual crisis.

The revisions began in 2020. The most impactful change will be the elimination of the seven principles. The principles will be replaced by 6 Shared Values and a new UU logo.

The proposed Principles are:

Pluralism: diverse culture, differences and commonalities

Justice: Multicultural, Dismantle Racism and all forms of systemic oppression

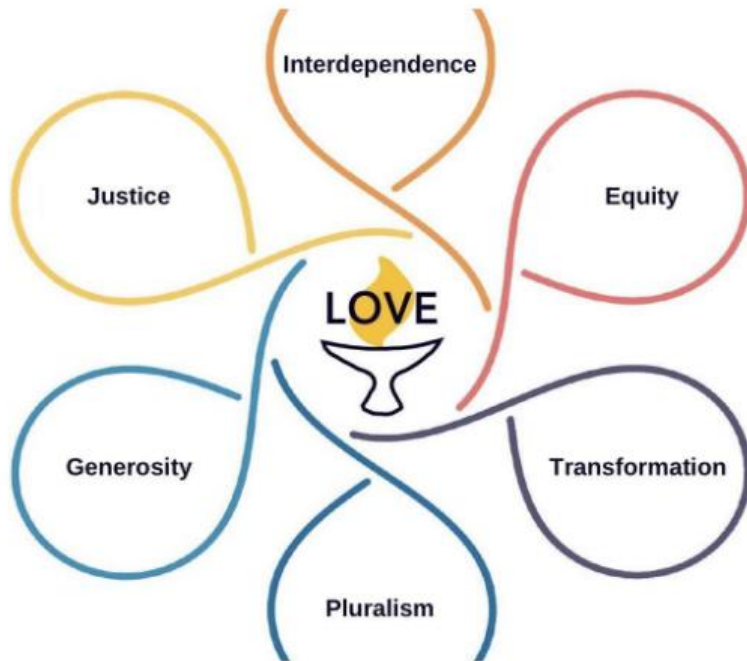
Transformation: Collectively transform and grow

Generosity: gratitude and hope, sharing resources, faith and presence

Equity: right to flourish with inherent dignity and worthiness

Interdependence of all beings

See new proposed logo below



Actions for immediate witness for 2023/2024:

Organizing for Health Equity

Protect the Dreamers, the Recipients of Deferred Action for Childhood Arrival (DACA) with a pathway to Permanent Residence

Rise Up to Stop Cop City

### **Fundraising Report Updates, Carol Benchley, Trustee**

The Auction Committee would like to thank the Board of Trustees for their solicitations as well as their donations.

We would also like to thank the congregation for all of their donations.

The Board of Trustees would like to thank Deidre especially for all of her hard work. It's hard to imagine that this auction would be as successful without her commitment and direction.

The Trustees would also like to thank:

Nancy Adrian for figuring out how to use the weekly Farmer's Market to benefit our auction.

Jane Bourette who put her advertising expertise to work.

Anne Scott for her social media guidance.

Kathy Stevens for all her energy as co-chair.

Kathy Tyrer for all her help with the posters.

Rob Benchley

Barbara Elder

Ray Haskell

Mary Stewart

Paul Stewart

### **Adjournment by President Susan Richards**

## Minister's Report

Thank you for the opportunity to serve you. I have found you a delight and look forward to our ongoing work.

I arrived at First Unitarian Universalist Nantucket on October 1, 2023. I spent the first several months getting to know you. That has included gathering history, meeting with congregants, pastoral care, and conducting Sunday Services, including music.

Additionally, I have attended as many meetings as I could, both community and church. The meetings have included BOT and Fin Com. I have looked at the budget. I have met with the church staff. I have spoken to almost all of the past ministers of the church. And I have listened to the congregants, their joys, and their worries. I did this over meals and coffee, in homes, and at the parsonage. I have read some of the things on the website.

These efforts have led me to suggest a transition team to the BOT, constructed of congregants not serving on a committee. It informed who should constitute my Committee on Ministry and resulted in my request to the BOT. I meet with the staff regularly.

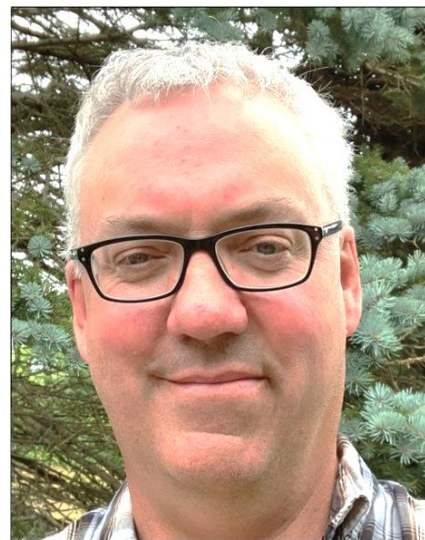
I am happy to say we have introduced new music. We have a spirituality group meeting for four weeks. Pastoral care visits continue to grow. I was asked to be the keynote for the interfaith committee group. I have been approached but have not committed to joining a healthcare provider group.

I have been mostly impressed with the congregation's commitment to this church's work. I am grateful to have met you all and look forward to our work together.

*Rev. Dr. Althea Smith*

## President's Report

I dedicate this year's President's Report to Carl Borchert, a great friend to our UU Congregation, conscientious worker, fierce advocate for green energy, and all-round good guy. Carl took over the presidency of our UU Board at an especially challenging time... He basically started his presidency without a minister which meant that as president he had to take on a huge amount of church responsibilities which he did thoughtfully, thoroughly, and with great respect for all with whom he came into contact. As I write this, about 3 months after his passing, I still can't quite believe I'm not going to see that 6'8" frame amble into Hendrix Hall. There are so many of us who will carry him with love in our memories. Thank you, Carl.



2023 was a year of big changes and challenges for our Congregation. I am going to break the year up into 2-month segments of time to make this year's journey easier to see.

### **January/February:**

Rev Linda has announced in 2022 that she is stepping down as of February. The Board is hard at work on preparing for her departure from the business of running the church to the farewell party plans. Special focus on: hiring of a full time business manager - (by the end of February Ray Haskell had been offered and accepted the position).

We had our Annual Congregational Meeting on January 22nd via zoom... The 2023 Budget was discussed, voted on and approved. Rev Linda and Gary were recognized and celebrated. Outgoing Board trustees were thanked and incoming trustees were welcomed.

Other items being worked on:

- Prep for Parsonage repair while there is no one living in it. Thanks to Jim Sulzer for leading the coordination of this work and completing it in time for our Transitional Minister Rev Althea Smith to move in at the end of September
- Interim Minister Search Task Force formed with Lora Stewart as Chair - lots of work to do in a short period of time!
- Regular updates and contact with Lay Led Committee which begins to plan and lead all services as of the end of February

**March/April:** Linda has left and the Interim Minister Search Task Force is hard at work in the UUA directed process of searching for an Interim minister. Work on the Parsonage has begun and the Lay Led/Worship Committee has started having meetings twice a month to keep up with the work of weekly service planning. We decided on taking the last two weeks in May to prepare for the move back up to the Sanctuary... One week will be a Mother's Day Brunch in the AR and one week will be a Spring Cleaning. Other topics of discussion and work:

- 4th of July event will not focus on fundraising this year but on getting this popular event up and running as we haven't had it in person since 2019
- The BOT voted to appoint Kat Robinson Grieder as a delegate to the General Assembly being held in Pittsburgh. Later we also appointed Jan Ellsworth as a delegate

**May/June:** We voted in a new Covid policy to take effect when the congregation moves up to the Sanctuary on Memorial Day. During our meeting we got the news that our Congregation was not matched with an Interim minister. Later in the month via email we voted to appoint the interim Minister Search Task Force to continue their work as a Transitional Minister Search Task Force with directions to (1) try to hire a Contract or Developmental or other type of full-time minister through the UUA processes and (2) explore productive alternative methods to obtain ministerial leadership for our congregation.

Summer fundraising and event plans are in full swing with Deirdre Duffy taking over as the chair of the Auction committee due to take place in August with Cynthia Cazaby coordinating the 4th of July plans. Barbara Elder has suggested the return of the noon day concerts (which later became a reality, managed by Barbara of course!)

**July/August:** The Board received with regret and appreciation the resignation of two Trustees - Carl Borchert and Kristina Strand.

Kat Robinson Grieder and Jan Ellsworth gave a short report about their experience as delegates attending the UU General Assembly in June. There were about 5,000 total delegates and there was much discussion about the changes to Article II. We agreed that we'd like to hear more about their experiences possibly at a service or in a congregational discussion (which happened during a 2 week service break at the end of October.

Other happenings of note:

August 20th - Summer Congregational Meeting consisted of many important updates from the Minister Search Committee, Treasurer, Lay Led Committee, Building and Grounds Committee, UU General Assembly, and Fundraising. No votes were necessary and there was lots of information shared and discussed.

In August, Nantucket UUs were approached by the Warming Place about providing overnight space. Other churches are being approached as well. Much discussion... We all agreed that we would like to help but there is concern about the logistics, the viability of our space and how much space availability we have. Ultimately, we ended up being able to help for one night per week.

In terms of the Transitional minister search – a new candidate, Rev. Althea Smith was interviewed via zoom at the end of the month

**September/October:** The happy news at September's Board meeting came from the Transitional Minister Search Task Force as they proposed that we offer the position of transitional minister from October 1st, 2023 through July 31st, 2024. The Board voted and unanimously approved. Lucky for us Rev Althea accepted our offer and her first service was on October 1st.

Unfortunately, we also had very sad news come our way in October. Carl Borchert unexpectedly passed away on Sunday morning, October 8th. I have dedicated this report to him... He was a part of us... and his dear partner in life, Randi, is still a part of us, reminding us of how important we are to each other.

**November/December:** The last two months of the year were full and busy of course, but we had time to reflect together as we got to know Rev Althea. We enjoyed seasonal and thought-provoking reflections as we celebrated all the holidays and special events of the season.

Finally, the second of my three-year terms on the Board of Trustees ends at this Annual Meeting on January 28, 2024. In total I have been on the Board for 9+ years since I became a Nantucket UU member back in 2012. I came to church wanting to be active in this congregation and I definitely got my wish! Although I am stepping off the Board, I plan on staying active on the Lay Led/Worship Committee, the WE Committee, and the Animal Ministry Committee. While I will miss my friends on the Board and all the camaraderie that comes with being part of a hardworking group of like-minded people, I look forward to devoting more time and energy into those other committees. I trust that the Board will continue on, hardworking as always, adding new trustees bringing their new energy and spirit to invest in this great group.

Thank you to all my fellow Board Trustees... It has been a pleasure and an honor to do the work of the church with you.

Thank you to Lora Stewart who is also stepping off the Board as of the January 28th Annual Meeting. Lora is one of the most dedicated, hardworking members of our Board (and a wide variety of other committees) with whom I have ever worked... a true inspiration!

Thanks also to the 3 ministers with whom I have worked during my time on the Board – Rev David Horst, the Interim Minister who so ably guided us on our journey to being ready for our Settled Minister, Rev Linda Simmons, whom I worked and learned with for almost 10 years, and finally, our current

transitional minister, Rev Althea Smith who has hit the ground running as we go forward together on the next steps of our UU journey!

*Susan Richards*  
*Outgoing President, Board of Trustees*

## Clerk's Report

We continue to hear from representatives at the UUA (Unitarian Universalist Association) that there is a nationwide decrease in general membership numbers along with youth numbers not only for UU congregations but for many other organized denominations as well. The Pandemic still has an impact as 2023 is the first year since 2019 that we have completely met in person.

### **Hybrid Services:**

It certainly looks like Hybrid services are here to stay and remote attendance at weekly services has remained steady at 15-20 attendees each week. Except for services like our Animal Blessing and our Christmas Eve service, we are always offering a zoom option now and we are working on ways to optimize the zoom experience and connecting our virtual and in-person congregations.

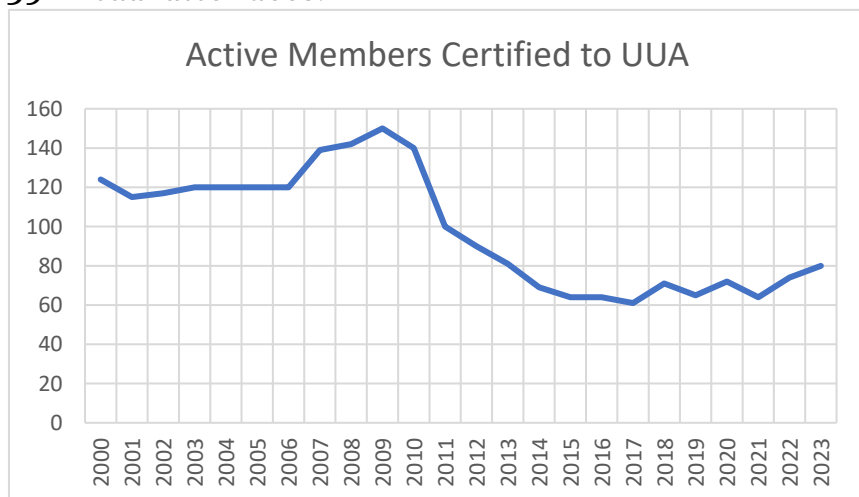
### **Service Attendance:**

For the first time since 2019, all services were held in person as well as virtually. We had 4 weeks of events/discussion groups instead of services (no virtual attendance). So, in total, we had 48 services with an average of 30-45 attendance in person and 10-20 virtual attendance. One notable exception to this attendance range was Rev Linda's farewell service which was at 85 attendees in person and 35 virtual attendees.

### **Clerk's Committee:**

On January 25, 2024, a Clerk's Committee of Barbara Elder, Lora and Paul Stewart, Randi Allfather, Suse Robinson, and Susan and Peter Richards was convened to review our membership list for

the express purpose of reporting our membership numbers to the UUA for UU Congregation Certification. This is done annually in January. Our congregational member numbers have slowly but surely increased in the past 3 years since Covid.



*Report Submitted by Susan Richards, Clerk (January -July 2023), President (August - December 2023) with assistance from Business Manager, Ray Haskell*

## Music Director's Report

Greetings, and Happy New Year! This time last year, the church was in a very different place. 2023 has been a long year, with heartwarming, uplifting, and exciting moments, as well as uncertain and challenging moments. I was here on 44 of the 48 Sundays we had service in 2023, playing piano, bass, or directing the choir, or all of the above. Jennifer Maxwell subbed for us on Jan 1, 2023, Barbara Elder subbed on April 23, Susan Berman and Ray Saunders led songs for the blessing of the Animals on October 8, and Eddie Wilkin subbed on piano for service on 11/ 11. We did not have service on 4 Sundays, May 14 and 21, and on October 15 and 22.

In January 2023, we began to prepare for our beloved Reverend Linda Simmon's departure. We gave an all zoom service on January 22 dedicated to Linda, and had guest musicians Chris Hanson and Allison Ritter with us to share some music in her honor. We had a big send off service on Feb 19, Linda's last day at the pulpit, and my goal was to feature as many guest musicians as I could find: Susan and Ray sang "Ready to Sail" by Patrick Alger and Austin Cunningham, they joined Chris Hanson and myself for a rendition of Ashokan Farewell, Paul Connors sang "Accentuate the Positive" and the Meetinghouse Choir sang the Irish traditional, "Parting Glass." It was a beautiful service, and we were all sad to see her go.

Then began the uncertain and challenging task of finding an interim minister. To me as music director, tasked with keeping music alive and vibrant, this meant leaning in and working hard to keep services musically rich, varied, and interesting. We have a core group of choir members, stalwart singers who are constant in their attendance, committed to the craft of music making, and show up with their best voices every Tuesday evening for rehearsal, and Sunday for services. During the spring and summer we saw new faces joining us regularly while some of our winter time members were more busy with summer activities, and when our summer members left in the fall, we had our winter regulars return to more active participation. During 2023 we've also seen more guest musicians than any of my previous years. As mentioned, we had guests during Linda's last months to play her out, but in March, the choir was joined by Avi Chitrit, Michele Whelan, and Rob Dunbar to perform a modern Native American Song called Water Is Life. April was more routine, with choir anthems regularly each week, while I took a week off for school break in April. During May the church had two weeks off, and we reopened in our summer sanctuary on Memorial Day, May 28. Tom Peppard joined us to play taps from the organ loft, and we sang our traditional Memorial Day anthem, Tenting Tonight.

June and July were exciting musical months. Carson Cooman joined us on organ for service on June 4, and on July 2, Ann Scott, Charley Walters, and I collaborated on a Jazz themed service. We were joined by guest pianist Anthony Healy, guest drummer Colin Harrington, and we learned about jazz's long history as a spiritual practice, as well as an American art form. Later that same month, Isaiah Williams played service for us on the Goodrich Organ, and the following Sunday we had another wonderful musically themed service, this time with Susan Richards leading a service based on the 7 principles as illustrated by Beatles songs. We had a lot of fun with this one, and had guest musicians perform and collaborate - Chris Hanson sang "Dear Prudence," Susan and Ray sang "Yellow Submarine," I sang "Fixing A Hole," Bob Middleton sang "In My Life," and then choir and everybody, all together now, sang "All You Need Is Love."

I should mention here, that during July I achieved a personal musical milestone. Some might be aware that I started piano late - at age 26, after earning a Bachelors degree in Jazz Bass Performance. Now, at age 37, I've been studying and practicing piano for 11 years, and for the last 7 of those years, I have been working with a Toronto based piano coach. This year, he



suggested I “sit for an exam,” through a Canadian organization called the Royal Conservatory of Music. It’s a rigorous curriculum with 10 levels from beginner through concert repertory, and on July 28 I sat for my level 7 practical piano exams. This included preparing a 20 minute set of challenging piano music to perform for a jury, answering theory and ear training questions, as well as performing technical etudes and exercises. I passed with a final grade of 92 out of 100, or First Class Honors with Distinction. This was a major milestone for me, and although I didn’t make an announcement in service, I consider this achievement to be a vital part of my growth as music director. The work required to prepare for the test has made the work required to perform for services that much easier, and I’m now able to tackle more technically demanding choir music, and perform more varied and interesting repertoire during Sunday Services with more ease and confidence. I’m continually grateful for the opportunity this congregation gives me to hone my craft, sharpen my skills, and I will continue to strive to grow my skills and knowledge to provide interesting music for this congregation.

In August, Carson Cooman came back and played two dates for us - August 13 and 20. September opened up with another music centered service, this time with a Labor Day Theme. We had guest jazz pianist Jake Vohs, Amanda Torchia on vocals, and Avi Chitrit on percussion, and we sang Work Song by Nat Adderly, the Ballad of John Henry, and performed an arrangement of mine featuring transcriptions of old work songs.

On September 24, after a long period of waiting, uncertainty, and hopefulness, we welcomed our newly hired contract minister Althea Smith to our sanctuary for a visit. She began as minister the following week, but this week she came with her partner Melissa as a guest. Avi and Chris played with us that day. The choir sang Woyaya, and we performed an original song of Avi’s called, “I Love You Because I Love You.” On October 1, Rev Althea took the pulpit, and we had a new minister with us.

The choir took the month of October off, so Althea’s first two Sundays were sung by Jessica Sanseverino on October 1, and Susan and Ray on October 8, for the Blessing of the Animals. The church took October 15 and 22 off from regular service.

The month of November was more or less quiet, but one service highlight was the service for Indigenous People’s day, and Day of Mourning. It was a wonderful service led by Rev Althea, and we had Amanda Torchia leading songs, including a beautiful song in the Ojibwe language called “We Remember You,” or “Gimikwenimigo.”

The last month of 2023, December, was a busy month. In music world, I decided to pull out a few stops and reach out to guests from the wider island music community. On December 3, we had a full band and 9 person choir, and we welcomed the Christmas season with a trio version of Vince Guaraldi’s “Christmas Is Coming” from the Charlie Brown Christmas soundtrack. On December 17, I invited more choir guests, and we sang our traditional midwinter anthem “Solstice Song.” On Christmas Eve, December 24, Kat Grieder and I led a “story and carols” service - Kat and Suse Robinson read “The Legend of the Christmas Rose,” we sang carols, and had guest singers Cynthia Csabay, Amanda Torchia, and Kip Buccino. On the final Sunday of the year, New Years Eve December 31, we celebrated Kwanzaa. We had guests Phaedra Plank, Jessica Sanseverino, and Chris Hanson, and sang “We Are…” by Ysaye M Barnwell, and a Swahili folk blessing called Bwana Awabariki.

All this to say, 2023 has been busy! I look forward to continuing to provide quality music for the congregation, and am excited to learn what 2024 has to bring.

Sincerely,  
*Nigel Goss, Music Director*

## Noonday Concert Report

We were fortunate to hold the Noonday Concert Series once again in our historic and beautiful sanctuary. In the summer of 2023, the Noonday Concerts restarted following a two year hiatus due to the pandemic. The last concert season was in the summer of 2020 when Nigel Goss produced a virtual series. 2020.

There were a total of seven concerts beginning on July 13 and held every Thursday at noon after the bell tolls 52 times. The Noonday Concerts began to feature our historic Goodrich organ and have grown to include other performances as well. Ten musicians performed half hour concerts, some of which were in very hot and humid temperatures. Our audiences averaged around 12 - 20 people per week. We started with a balance of \$322 and ended the series with \$748. Donations (suggested only) are taken at the door and musicians are paid a small stipend.

Many thanks to Peter Richards, Paul Stewart, and Jim Sulzer who helped organize and facilitate the Noonday Concerts. Thank you to Ray Haskell for printing the programs.

### JULY

13 Joe Hammer, organ

20 Isaiah Williams, organ recital, part I

27 Susan Berman & Ray K. Saunders, vocals & guitar, original songs

### AUGUST

3 Isaiah Williams, organ recital, part II

10 Nantucket Blue Vocal Jazz Ensemble, Nigel Goss

17 Carson Cooman, organ

24 Mitch Blake, vocals & guitar

### **Original concept for the Noonday Concert Series:**

The concept for the concert series is to provide a weekly opportunity to attend a concert, experience the main sanctuary of the church filled with music for a half an hour. The intent is to create an uncomplicated series for busy summer folks and year rounders. It is a familiar format in many city churches. The concert design is simple, allowing people to walk in off the street, come on break during their lunch, enjoy thirty minutes of musical enrichment during their busy summer time. Many churches in other places program a half an hour of music weekly in their churches to allow people to hear their historic instruments, as well as appreciate the fabulous acoustics inside their buildings. Our sanctuary has so much to offer for the musical spiritual soul - a wonderful piano, historic organ and beautiful acoustics. The goal of the concerts is to serve a thriving downtown summer population and provide momentary calmness, enjoyment and serenity in our sanctuary with music.

Respectfully submitted,

*Barbara Elder*

## Buildings and Grounds Committee

The B&G Committee oversees regular maintenance on the Meeting House and the Parsonage. The South Church Preservation Fund handles much of the capital (major) maintenance on the Meeting House. A Parsonage Capital Maintenance Committee (which overlaps somewhat with B&G) oversees major work on our parsonage.

Carl Borchert was the organizer of B&G for a good while; we miss him! Since his passing, Meeting House annual maintenance projects have been done as needed but without the welcome organization he brought to the work.

## Parsonage Capital Maintenance

Our lovely old Parsonage has long been in need of work. And our Parsonage Capital Maintenance Committee (Nancy Mack and Jim Sulzer [*co-chairs*], Paul Stewart, Rob Dunbar, Carl Borchert) has been hard at work this past year.

In preparation for the expected arrival of a new minister in early fall of 2023, the Parsonage Committee—at the direction of the Board of Trustees—oversaw extensive repairs and renovation. These were possible both because the Parsonage was unoccupied beginning in March 2023 and because of the funds gathered over the years in the Parsonage Capital Maintenance Fund.

Here's a summary of the work that was completed this past year:

### **Windows and downspouts**

- repaired all windows
- replaced trim and windowsills as needed
- redid questionable downspouts, cleaned gutters
- purchased and installed new storm windows for all windows

### **Painting**

- repaired and repainted ceilings on first floor, repaired office bookshelves, repainted entire kitchen, repainted first floor bathroom, other interior ceilings
- repainted entire exterior, and both interior and exterior of window sashes

### **Handyman work**

- weatherstripping, replaced basement door, replaced vanity 2<sup>nd</sup> floor, replaced vent/light/heater 1<sup>st</sup> floor, replaced walls 1<sup>st</sup> floor bathroom, electric repair

### **Plumbing**

- repaired leak in first floor bathroom shower valve and pipe
- repaired leak under vanity in second floor bathroom
- replaced defective toilet on second floor

### **Still left to be done:**

- Replace bad sills on office side of house and Main St side of house
- dig trench by office side of house for drainage

**Money \$\$** spent to date: about \$65,000, all from the Parsonage Capital Maintenance Fund.

Respectfully submitted,

*Jim Sulzer*

## Caring Team

During the first two months of 2023, our departing settled minister, Rev. Linda Simmons, provided most of the “in person” pastoral care for our congregation. She made sure to see as many congregants as possible as she said her goodbyes. The Caring Team continued to provide assistance with meals, errands and transportation to appointments as well as some home visits. With the departure of Rev. Linda at the end of February, the care of one another in our church community became a group responsibility and the culture of caring that has been developed within the entire congregation over the years was evident throughout this challenging year. As Caring Team Chair, Lora Stewart was often contacted to alert her to a specific need for someone within the church. Lora was able to recruit a number of folks to help the Team. Without our minister, our mission of “working in coordination with the minister to augment the needed pastoral work within the congregation” fell to the members of the Caring Team.

With everyone’s help, we were able to:

- Reach out to parishioners with phone calls, messages, and cards when appropriate
- Provide company for individuals recovering from surgery and others who wished for a visit
- Facilitate providing meals, transportation and errands for those in need
- Arrange occasional help with small household jobs as needed
- Help identify needs and resources within the Meeting House and wider community
- Encourage others in the congregation to participate in fulfilling our mission

Many thanks to Loretta Middleton, Deirdre Duffy, Lydia Sussek and Judy Norkin for agreeing to serve as needed. Thanks to Peter Richards for stepping up with offers of rides and to David Hall for his willingness to help with small projects/jobs whenever needed. There are many more of you who just see a need and spontaneously provide a meal, ride or visit for someone who needs that. Thank you!!

### **Comfort Shawls**

2023 marked the 10<sup>th</sup> anniversary of the Shawl Ministry that Lora Stewart started when she joined the church in 2013. Under the umbrella of the Caring Team, the Shawl Ministry is dedicated to knitting and crocheting shawls for Meeting House congregants, as well as their loved ones, friends and acquaintances who are facing illness, bereavement or other challenges. Once again, members of the Saturday morning Craft Group have “stepped up” and knit enough beautiful shawls to meet the need this year. The Craft Group calls them “comfort shawls” and, indeed there is love and intended comfort instilled in each stitch by these ambassadors of the congregation. In 2023, we gave away four shawls bring our total to 96 to date. Shawls are very easy to knit. If you are interested in contributing to our ready stash of shawls, please let Lora Stewart know. (Phone 978-729-4026). We have yarn to use. You provide the loving labor.

This year, it is with sadness that, we said goodbye to:

1. Kathleen Duncombe - January 12, 2023
2. Maryjane Halliday - March 8, 2023
3. Lucille Jordan – July 24, 2023
4. Grace Noyes – August 21, 2023
5. John Brady – October 5, 2023 – (son of congregant Jean Keating)
6. Carl Borchert – October 8, 2023

The Caring Team members do not provide counseling but we enjoy people and are good listeners. We are happiest when we make new friends, provide company and conversation, and can help out here and there as needed and wanted. The Caring Team is here for you. Please do not hesitate to reach out if you or someone you know of is in need.

Respectfully submitted,

*Lora Stewart, Chair*

## Docent Report

For the previous two summers docenting in the sanctuary had been limited by the daily covid rating posted by the Nantucket Board of Health. This past summer there was no longer any serious Covid threat, so we were free to open up as we had been in pre-Covid years. Visitors could enter the sanctuary without having to wear a mask or show their vaccination card. We opened up the sanctuary to the public on July 6th, closed on September 2nd and were open Wednesdays through Saturdays, from 10am-2pm. July had 19 days while August/September added 22 more. There were 337 visitors from 31states/DC with another 25 from 12 foreign countries.

Among the docents this summer were Paul Stewart, Jim Sulzer, and for one morning in late August, Judy Norkin and Michael Barron took a turn to get acquainted with the system with hopes of becoming regular docents next summer.

Docenting is such a rewarding experience, spending a couple of hours meeting people from all over our country and the world. Visitors are taken in by the beauty of our sanctuary and are so pleased that they stopped in to take a look. Often visitors promise to bring their friends next time they visit! Perhaps you might like to consider becoming a docent volunteer for next summer. We would love to have you join us!

*Peter H. Richards*

## FUNdraising

### Yard Sale

**The Nantucket UU Yard Sale provides everyone a way to Reduce unnecessary items in their homes by donating, Reuse them for a new purpose or at a new home, and Recycle remaining goods. That is the mission that guides the many members who volunteer to pick up, price, store and display the donations collected.**

**The sale was held on Saturday, May 20, 2023 at the home of Lora and Paul Stewart on Madaket Rd. \$1900 was raised that day. Donations came from many in our congregation. Some items were kept for use in the church kitchen and some have made the Parsonage on Fair St. a more welcoming home for our minister. Many quality items were donated to the Hospital Thrift Shop and others to the Take it or Leave it.**

**Volunteers, Carol Benchley, Christine Sanford, Joanne Polster, Suse Robinson, Kathy Stevens, Ann Perkins, Carl Borchert, Deirdre Duffy, Susan Kirk, Loretta and Bob Middleton and our hosts, Lora and Paul Stewart worked hard and had lots of fun, building community and friendships along the way.**

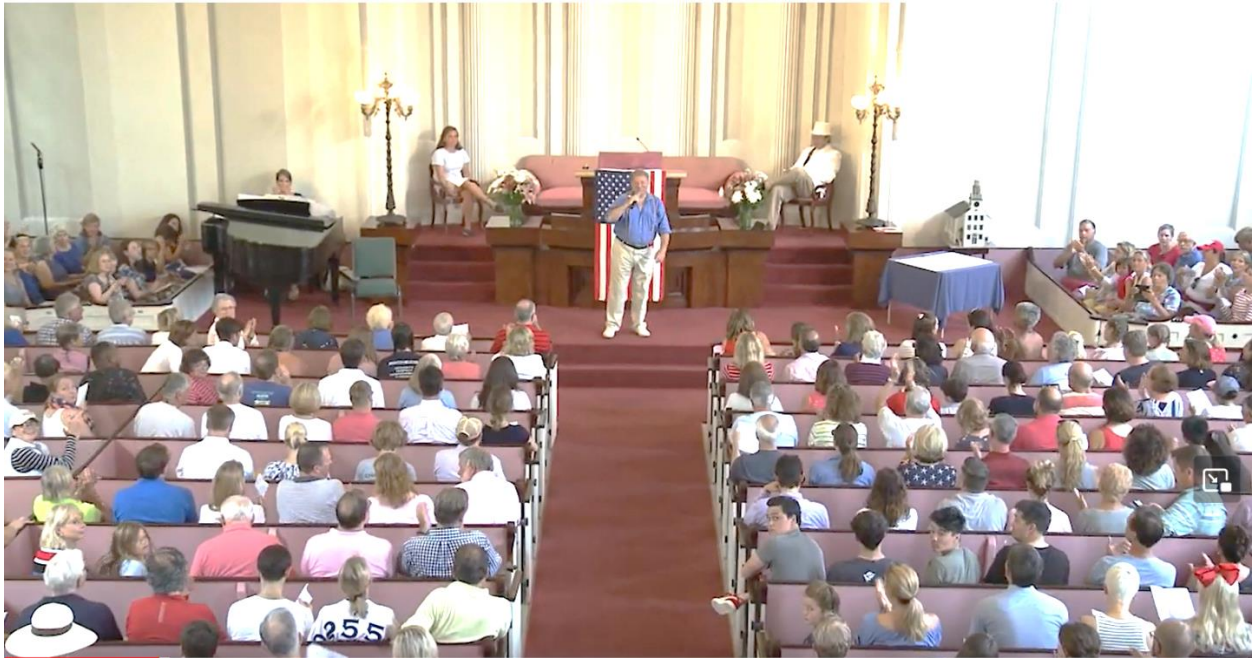
The Annual UU Yard Sale is a good place for all to contribute time and goods to help fund the good works of this community.

Sincerely,

**Loretta Middleton**  
Volunteer coordinator

### July 4th Event

We had to do the July 4th event virtually in 2020, 2021, and 2022 (see the great video montage at [youtube.com/watch?v=svtM9\\_XT\\_m4](https://youtube.com/watch?v=svtM9_XT_m4)):



For 2023 we restarted the event in person. Cynthia Csabay organized a fine show that was enjoyed by all. We plan to expand this program significantly in 2024.

### Silent Auction

#### **Purpose:**

To manage an annual Silent Auction whose purpose is both fundraising and friend raising.

#### **Committee Members**

- Jane Bourette (Marketing & Creativity)
- Deirdre Duffy (Software support, solicitation of prior year donors, & delivery of prizes)
- Alison Forsgren (Past Chair)
- Carol Benchley (Board liaison & delivery of prizes)
- Nancy Adrian (Past chair)
- Barbara Elder (Advisory) (Past Chair)
- Ann Scott (Advisory & Social Media)
- Kathy Tyrer (Advisory & poster distribution)
- Kathy Stevens (Admin, nudge, strategic overview)

## The Silent Auction 2023

- # of Bidders = 70
- # of donors = 48
- # of items donated = 87
- # of items sold = 67 (not counting multiples of certain items such as Lora's lunch and dinners or Susan's soups)
- Amount we made = \$12,721.04

## Plans for 2024

- *Move the date of the Silent Auction earlier to July 10-13 with a 10 day preview beginning July 3.*
  - Mid August is too late for the unique experiences to happen that summer & summer resident families with children are in the process of leaving. Additionally, asking local businesses earlier before they are in their busy selling season. Silent Auction planning would need to begin in February.
- *Recommend Marketing Budget for 2023 Silent Auction*
  - For external publicity to increase pool of bidders beyond members and friends with deep roots in the congregation.
- Purchase the LAUNCH upgrade to make more efficient use of Deirdre's time by providing learning, consulting and implementation support. (around \$400)

*Deirdre Duffy and Kathy Stevens*

## Quilt Raffle

Through the winter and spring our Saturday morning craft group lovingly created our beautiful Nantucket quilt, hand embroidering and hand quilting every stitch. Members of the group sold raffle tickets on Main Street three days a week throughout the summer. In addition to surpassing our financial goal, our presence on Main Street gave exposure to our UU church, the church around the corner, with the beautiful gold dome.

Our net profit was about \$3,000.

*Susan Kirk*



## Holiday Crafts Sale

This year, in lieu of an online sale, the Saturday Craft Group opted to have a “Pop Up Sale” in the foyer of the church on Saturday of Stroll Weekend. Tables were “womaned” by members of the group. Pricing and set-up were able to be finished in one day so we were ready to go when the sale started at 10am.

Over the next four hours, most of the items created during the year were sold. What remained of the crafts were laid out after our church service the two following Sundays. This proved to be a far less time-consuming way to accomplish the fundraiser and provided about \$1,300 for our Operating Budget. Thank you to all our crafters and those who helped the day of the sale.



On behalf of the Saturday Craft Group,  
respectfully submitted,  
*Suse Robinson and Lora Stewart*

## Growing Connections Between Friends and Members Committee

During 2023, the mission of this committee continued to be to:

1. Support and recognize current members
2. Welcome and deliberately invite our summer members to to join in on church-wide social activities
3. Participate in New Member Ceremonies and welcome and encourage new members
4. Participate in the Clerk’s Committee to do the yearly member count for our annual report to the UUA
5. Plan ongoing social activities that are welcoming. All activities are designed to encourage participation by current members and ‘friends’ as well as others from the wider community

Since the beginning of Covid, the **Growing Connections Between Friends and Members Committee** has supported and encouraged an ever-expanding sense of community within and beyond our Meeting House. The committee has supported both old, established groups and encouraged new groups to form. Sometimes these groups have been virtual and sometimes it has been possible to meet in person. In all cases, these groups have provided an invaluable connection to others and allowed those who cannot be present in the Meeting House to remain connected to the community. Several new groups have formed, including the Monday “Tea” group who is entering its fifth year! It meets on Zoom-only every Monday afternoon at 4pm. On any given week, there will be current and former congregants Zooming in from all over the



country. Being able to keep in touch from anywhere has been one of the “silver linings” of Covid. This ability to maintain contact from afar has often been commented on by someone away from Nantucket. At the beginning of Covid, the social “Game Night” met nearly weekly. There were rousing games of Bingo, virtual card games, and we all were introduced to our beloved “Chicken Foot”. At the height of Covid, Parker Richards provided many (very) challenging games of Trivia. It should be noted that one of our older congregants was often the “star of the game”, while the rest of us struggled to get even half correct. Happily, more recently, we have been able to meet in person and have even added fairly regular potlucks before the games begin. Most of us like to eat and we are all hoping the virtual “Cooking Group” makes a return appearance in 2024.

The Saturday Morning Craft Group has been meeting since well before Covid and it is certainly one of the “stars” of this committee. This group understands the many components that go into nurturing a thriving community. This weekly group has given rise to many friendships within the Meeting House and has encouraged people from the wider community to join in. Each year, members of this group support the Caring Team by creating “comfort shawls” for distribution by the Team to those facing a challenge. The Craft Group holds two fundraisers during the year; a holiday sale in December and a quilt raffle in the summer. During the winter, the Craft Group embroiders quilt Squares under the tutelage of Susan Kirk, and she puts the quilt together by hand stitching the pieces each spring. All summer, the quilt is raffled off by selling tickets on Main Street and the winning ticket is drawn at the end of the summer. Finally, throughout the year, the Craft Group creates many craft objects that are sold at their Holiday Craft Sale. The Craft Group does it all! They provide a place to develop friendships within and outside of our congregation. They help nurture our congregants and friends of our congregants by the connection they have forged with the Caring Team through the beautiful Shawls they create and donate for gifts in times of challenge. They contribute financially to the Operating Budget of the church through their fundraising efforts.

The Growing Connections Between Friends and Members Committee has served our congregation well since it was formed at the beginning of the pandemic. There are now several established groups, open to all, that have helped attract new folks to the church. The groups meet for different purposes at different intervals to share time, friendship and work.

Often ideas are floated for new groups. A book group has come up often, as has a cooking group. If you have an idea, feel free to suggest other ways to gather socially while we connect with each other.

Respectfully submitted,

*Lora Stewart, Chair, Susan Richards, and Kat Grieder*

## Lay Led Service Committee

The 2023 Lay Led Committee included Kat Robinson Grieder, Joanne Polster, Val Hall, Susan Berman, Annie Scott, Kathy Stevens and Susan Richards

2023 has been a challenging yet very satisfying year for our Committee. With the health issues and the February departure of Rev Linda Simmons, we have worked very hard to take on the challenge of creating and leading all the weekly services for much of the year.

We said farewell to three Committee members in the Fall. Susan Berman, Annie Scott, and Kathy Stevens (who joined us for several months after Rev Linda stepped away to give us some help with ideas and structure of our Committee work). Thanks so much to Susan, Annie, and Kathy for all your help during this challenging time!

We also thank our Guest speakers and Leaders throughout the year, especially those within the Congregation, Paul Stewart, Lora Stewart, Susan Kirk, Deirdre Duffy, Peter Richards, Barbara Elder, and Jim Sulzer plus some special outside the congregation speakers as well.

On the behind the scenes side...of course we must thank our always tech-knowledgeable Deirdre Duffy along with our ever-reliable business manager, Ray Haskell, who has definitely proven himself to be a jack-of-all trades!

And we couldn't have done any of these services without the creativity and hard work of our Music Director, Nigel Goss, using his own creative talents plus all the musical guests he invited to participate throughout the year which included our talented congregational regulars - Susan Berman and Ray Saunders, Chris Hanson, Rob Dunbar, Bob Middleton, Cynthia Csabay, and Phaedra Plank plus of course our small but mighty Meetinghouse Choir! Thank you Nigel and all!

We've enjoyed our work together and if there's anyone out there who would like to join us or has some suggestions or ideas, please don't hesitate to reach out to us!

Following is the year's calendar of the services we held throughout 2023. There were also 2 weeks in May and 2 weeks in October when we had other special happenings instead of formal services - A Mother's Day Brunch, A Spring Cleaning of the Sanctuary in May and two UU themed discussions in October. All in all, our Lay Led Committee led/coordinated 40 weeks of services and weekly events!

## WORSHIP COMMITTEE SERVICES 2023

MONTH/ DATE	LAY LEADER	THEME	SPEAKER	NOTES
January 22	Susan Berman, Susan Richards and the BOT	The Seven Principles of Linda	Multiple Board Members	Board Service dedicated to Rev Linda - birthday on 1/24
January 26	Susan Berman	Our UU Satsang	Susan B.	
February 26	Susan Richards	Reading and Spirituality	Multiple Congregation members	
March 5	Susan Berman.	Purim	Susan B.	
March 12	Val Hall	Soul of An Octopus	Val	One Book, One Island
March 19	Kat Robinson Grieder	Introducing Soul Matters: Journey	Kat	From Soul Matters UUA Resources
March 26	Susan Richards	Giving Back	Pam Murphy	
April 2	Val Hall	The Wisdom of Trees	Val	
April 9	Susan Berman	Easter/ Passover/ Spring celebrations	Multiple speakers	

April 16	Susan Richards and Annie Scott	Soul Matters - Curiosity and Consequences	Susan and Ann	
April 23	Paul Stewart	A History of Objects in Hendrix Hall	Paul Stewart	Barbara Elder in for Nigel (for music)
April 30	Kat Robinson Grieder	Interactive; Interview: 7th Principle relating to Science	Rich Blundell	
May 7	Lora Stewart	Our UU Family	Lora Stewart	Last service in Hendrix Hall
May 14	Mother's Day brunch in AR			NO SERVICE
May 21	Meeting House Spring Cleaning			NO SERVICE

### Summer Services in Sanctuary

May 28	Val Hall	What does Memorial Day mean to us?		Patrick Topham and Hollis Webb	Memorial Day service
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June 4	Susan Richards	Spiritual Journeys	Susan Kirk, Deirdre Duffy, Annie Scott, and Susan Richards		
June 11	Joanne Polster	When Air Becomes Breath		Andrew Viselli	
June 18	Val Hall	Healing Divisions - How can we achieve common ground in spite of our differences?		Bruce Bond, founder of Common Ground Committee	
June 25	Susan Berman	Continuing Nantucket Maritime Traditions		Evan Schwanfelder from Egan Maritime Institute	
July 2	Annie Scott and Nigel	A Jazz Service	Charley Walters		
July 9	Joanne Polster	Dorothy Day - Radical Love	Father Max from St Pauls	Father Max (St.Paul's)	
July 16	Susan Richards	The Wisdom of Age		David Horst	

July 23	Susan Richards	What is a Mind?-- and Why AI May Struggle to Have One		Hans Brieter	
July 30	Susan and Peter Richards	UU Principles according to the Beatles		Susan and Peter	
August 6	Annie Scott	The Essence of the Invisible		Annie Scott	
August 13	Susan Berman	Medical Ethics and the Serious Illness Conversation		Margaret Koehm MD & Libby Tracey RN)	
August 20	Susan Richards	Our First Minister - Seth Swift	Paul Stewart	Shortened service	Summer Congregational Meeting
August 27	Val Hall	Gratitude in the Islamic Tradition	Dr. Abrar A. Qureshi		
September 3	Barbara Elder and Jim Sulzer	A Seat at the Table, A Reflection on Labor Day	Multiple speakers		Quilt Raffle Drawing

September 10	Val Hall and Joanne Polster	Happy Birthday Mary Oliver	Multiple speakers		Sept 10 is actually Mary Oliver's birthday.
September 17	Susan Richards	Barbie and the UU Connection - Closer to Fine	Susan Richards		
September 24	Kat Robinson Grieder	"How" is More Important Than "What"	Kat Robinson Grieder		
October 1	Annie Scott	Love Without Exception	Rev Althea		Rev Althea's first service
October 8	Susan Richards, Susan Berman and Rev Althea	Blessing of the Animals			Passing of the Plate for NiSHA

### Downstairs in Hendrix Hall

October 15	Kat Robinson Grieder and Jan Ellsworth	A review of our GA experience - -Proposed changes to UUA Bylaws Article II - Principles and Purposes of the UUA.		Not a service - GA review and discussion in AR
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October 22	Kat Robinson Grieder	Ecology as Scripture.		Not a service - Discussion in AR
October 29	Rev Althea	Celebrating Our Ancestors		
November 5	Rev Althea	Hope!?		
November 12	Rev Althea	It's Harvest Time, Are You Prepared?		
November 19	Susan Richards	Lahaina Strong	Nancy Adrian	
November 26	Rev Althea	Day of Mourning		
December 3	Rev Althea	Hope		
December 10	Rev Althea	Tis the Season of Holidays		
December 17	Val Hall	Reincarnation		
December 24	Kat Robinson Grieder and Nigel	Christmas Eve Story and Music		Christmas Eve service - story and caroling
December 31	Rev Althea	Kwanzaa		

Submitted by

*the Lay Led Committee - Susan Berman, Kat Robinson Grieder, Val Hall and Susan Richards*



## Interim Minister Search Task Force

The Reverend Linda Simmons was our settled minister for nearly ten years. In August, 2022, Rev. Linda informed the congregation of her intent to leave and, in February 2023, she said goodbye to the parishioners to start her “next chapter” as a psychotherapist. Her Goodbye Party with the congregation was on February 18, 2023. Shortly thereafter, at a special meeting of the Board of Trustees on February 25, 2023, the Ministerial Search Task Force was appointed. The members of this Task Force were: Lora Stewart, Barbara Elder, Randi Allfather and Paul Stewart.

At the Task Force’s first meeting on February 28, 2023, Lora was unanimously voted to be Chair and the group divided the work to be done. This group worked very well together and spent all of March completing our “Packet” for the UUA Jobs Board and accomplishing other tasks involved in searching for an Interim Minister using the UUA’s process.

We soon learned that, unlike in times past, there was a dearth of minister candidates this year. After the warning from our regional UUA representative, we weren’t expecting any interest in our small congregation 30 miles out to sea. To our surprise, we attracted two candidates and spent the month of May vetting the two that had expressed interest; reading their materials and checking references as well as interviewing them over Zoom. We told the Transitions Office that we would accept either as a “match”. Unfortunately, they were both from the west coast and elected to stay in that part of the country near their extended families.

In most years, the Transitions Office has conducted a second round of search. In 2023, they decided, instead, to refer all churches still in search and all ministers who had not found a match to the pool of around 100 unmatched churches vying for matches with “Contract Ministers”. The bad news was that this was even more competitive than the search for strictly Interim ministers. The silver lining was that a contract minister can come to a mutual agreement with a church to provide whatever service that church needs. In our case, we worked out an Agreement with Rev. Althea to do interim work for us.

During the four months of June, July, August and September, the intrepid Task Force (now titled the “Contract/Transitional/Interim Minister Search Task Force”) considered two non-UU ministers who contacted us independently, several more UU ministers who wished to do most of their work remotely (from as far away as Tennessee) or fit all of their hours into two weekends a month. Several others had promising skills but little time to offer. What a “roller coaster”!

In early September, Rev. Dr. Althea Smith appeared on our radar. In her we saw someone who had a rich background of skills including a divinity degree, a nursing degree and a doctorate in psychology. Her community ministry and activism would stretch our congregation’s imagination to try new things. We called her references, interviewed her and had her come, with her partner, to introduce them to the island. By the end of September, we had come to an agreement with her about our interim needs and she came to start her interim work with us on October 1<sup>st</sup>.

Respectfully submitted,  
*Lora Stewart*, Chair, Interim Ministerial Search Task Force

## Nominating Committee

This year's Nominating committee consisted of Anne Perkins, Peter Richards, and Jim Sulzer.

Our charge was to nominate:

Three Board of Trustees members to begin their three-year terms in 2024.

A Treasurer for a one year term.

Three Nominating Committee Members to serve in 2024.

Our nominations are:

### **BOARD OF TRUSTEES**

Deirdre Duffy

Jan Ellsworth

Chris Hanson

### **TREASURER**

Paul Stewart

### **NOMINATING COMMITTEE**

Anne Perkins

Susan Richards

Kat Robinson Grieder

Respectfully submitted,

*Anne Perkins, Peter Richards, Jim Sulzer*

## World Explorers Committee

In 2023 we finally escaped most of the wrath of the pandemic and were able to have regular weekly meetings where the children gathered for the entire year in person in the Activities Room or outside in our Garden space. In spite of the continued relatively low attendance, Leyah continues to offer her usual creativity along with community service projects with true UU spirit!

The WE committee has met regularly throughout the year, typically on a monthly basis. . Besides the usual planning, we have been discussing ideas for increasing our youth numbers and have some ideas in the works for 2024!

Below, summarized by Leyah our intrepid Children and Youth Program Director, are some seasonal highlights of the year.

SPRING '23– The Children's Garden went full-fledged this year, with seeded rows of carrots; tomatoes; peas; and potatoes, oh my! And though our rabbits got to the carrot tops, our tomatoes and potatoes made it to fruiting. By fall, we had adorable purple fingerlings which we turned into sculptures with the help of some toothpicks.

SUMMER— We kicked off the season in style, with a “bubble party” where we made our own giant bubble wands. The fairy house kit came back out with fresh stock, with tiny abodes still to be seen in the Children’s Garden. Any peeper frog “townies” had the perfect place to party!

FALL— It was inventor’s paradise in the AR this Fall, with a fabulous new slew of donated supplies to enjoy. Then with the holiday season for sweets galore, the kids hit the kitchen to make everything from adorable teeny apple pies to caramel candies. The kids had the spirit of giving this year, making their biggest bounty ever of crafts to sell at our coffee hour church sale.

We continue to greatly appreciate our Children and Youth Program Director, Leyah Jensen. She has gotten us through Covid and now is helping us get through the post-covid era. Our biggest wish

for 2024 is to grow our WE children population and expand upon our UU Curriculum. We have no doubt that Leyah can very successfully help us get to these goals!

Finally, Please don’t hesitate to contact any of us on the WE Team if you have questions or suggestions for WE! We welcome your input!

*Susan Richards, Lora Stewart, and Leyah Jensen*



## 7<sup>th</sup> Principle (Social Action) Projects

### Food Rescue Nantucket

Food Rescue Nantucket was growing and doing many good things until COVID stopped it abruptly. With Gary's imminent departure, the Food Rescue Cooler at the community farm was sold to the farm for storing their produce. Clearly Gary and Jack's efforts prove the concept; if there is another group that wants to restart this, it's certainly a reasonable effort.

### Animal Ministry

Our second full year of ministry was a quiet one. We managed some animal/environmental themed services mostly thanks to Val Hall who created and led 3 unique and inspirational services - *Soul of an Octopus*, *The Wisdom of Trees* and *Reincarnation from the Perspective of a Snail* - Single handedly Val is spreading the spirit of animal ministry!

We also had several vegetarian dinners and potlucks - a great way to socialize and spread the joy of plant-based, environmentally friendly eating!

We continue to regularly share Animal Ministry news in our UU eblasts.

We helped coordinate and lead our very popular annual Blessing of the Animals in early October with the proceeds of the plate passing going to our local animal shelter, NiSHA.

We have spread the news of the UUA Animal Ministry and encouraged our two UUA delegates to vote to support the change of wording in our UU Principles when they attended the UU General Assembly in June.

Below is a segment of an Animal Ministry newsletter which explains how members of the UUNational Animal Ministry (of which our Congregation is a member) managed to convince the Article 2 Commission to update their draft which will be voted on in this upcoming General Assembly in June:

**There was no mention of animals in the Article 2 Commission's draft last June.** From the UUNational Animal ministry members came a lot of input to asking that animals be included

**The Current revision following Jan 2023 UUA Board meeting includes this:**

Interdependence. We honor the sacred interdependent web of all existence. We covenant to cherish Earth and all beings by creating relationships of care and respect. With humility and reverence, we acknowledge our place in the great web of life, and we work to repair harm and damaged relationships.

We're hoping to become more active as an Animal Ministry in 2024, continuing our vegetarian potlucks and animal/environment-themed services along with maintaining the tradition of our Blessing of the Animals, while expanding to include a community service event or two - hopefully we'll be able to return to participate in the Nantucket Litter Derby in April (we were side-lined by bad weather this past year)

If you are interested in being a part of our ministry, or have questions or suggestions, please feel free to contact me at [susanoncobble@gmail.com](mailto:susanoncobble@gmail.com) . If you'd like to learn more about the National UUAnimal Ministry, here's the link: <https://www.uuam.org/>

*With respect for the inherent worth and dignity of every being, this report is submitted by Susan Richards*



## Immigrant Resource Center

In 2017 we accepted the Immigration Resource Center under the umbrella of our 7th Principle Project as an additional component of our ongoing social justice commitment.

The IRC originally offered legal advice and support to immigrants in need.

When COVID hit in 2020, the IRC reduced the advice it offered and started to receive and disburse funds to Islanders in need who were not receiving other forms of support.

In late 2023, as COVID funding was winding down and efforts on The Warming Place were revving up, the IRC decided to pause its operations until need (and leadership) revives.

The IRC's separate \$3,719 bank account, shown in row 5 of the chart on page 40, will be retained for a while to see if the IRC revives. If the IRC stays inactive for another couple of years, we will need to determine if that money must be returned to grantors or can be merged into our Social Action Fund, to be available for similar efforts in the future.

### Immigration Resource Center of Nantucket

A safe place to ask questions, receive referrals and compassion.  
If we don't know where to find the answers, we'll learn together!  
Spanish, Portuguese and English spoken.

First Monday of each month, 5:30-7:30pm  
Unitarian Meeting House  
11 Orange Street  
Nantucket, MA 02554  
[immigrationresourcecenter@gmail.com](mailto:immigrationresourcecenter@gmail.com)  
*All are welcome!*

### Centro de Recursos de Imigração de Nantucket

Um lugar seguro para tirar dúvidas, receber orientações e compaixão.  
Se nós não soubermos todas as respostas, iremos encontrá-las juntos!  
Atendimento em Espanhol, Português e Inglês.

primeiras segundas-feiras de cada mês, 5:30-7:30pm  
Unitarian Meeting House  
11 Orange Street  
Nantucket, MA 02554  
[immigrationresourcecenter@gmail.com](mailto:immigrationresourcecenter@gmail.com)  
Todos serão bem-vindos!

### Immigration Resource Center de Nantucket

Un lugar seguro para realizar consultas, recibir referencias y también compasión.  
Si no tenemos las respuestas a sus preguntas, ¡las buscaremos juntos!  
Hablamos Español, Portugués e Inglés.

primer lunes de cada mes de 5:30 pm a 7:30 pm en la  
Unitarian Meeting House, 11 Orange Street, Nantucket, MA 02554  
[immigrationresourcecenter@gmail.com](mailto:immigrationresourcecenter@gmail.com)



## Immigrant Resource Center

*Helping Nantucket Immigrants since 2017*  
*Servindo os imigrantes desde 2017*  
*Ayudando a los inmigrantes desde 2017*

**Call or text:**  
**774-325-6141**

**[immigrationresourcecenter@gmail.com](mailto:immigrationresourcecenter@gmail.com)**

Find us on Facebook:  
IMMIGRANT RESOURCE CENTER NANTUCKET

## Pledge Campaign Committee

In recent years a small group of people, mostly Trustees, self-formed to conduct the pledge drive. 2023 was especially busy for everyone, with Rev. Linda's departure, Lay Led running all services for seven months, the Interim Minister Search, and Rev. Althea's arrival. Led by our President, the Board undertook the role of Pledge Campaign Committee, with the understanding that it would necessarily be a less intense effort than most years.

On October 14 the Pledge Campaign mailed 90 pledge requests to members and friends, from which we ultimately expect about 62 pledges totaling about \$83K.

We continue to receive a slow flow of pledges but after annual meeting we'll run a reminder campaign to get those who have pledged in the past but not this year to formalize their 2024 pledge.

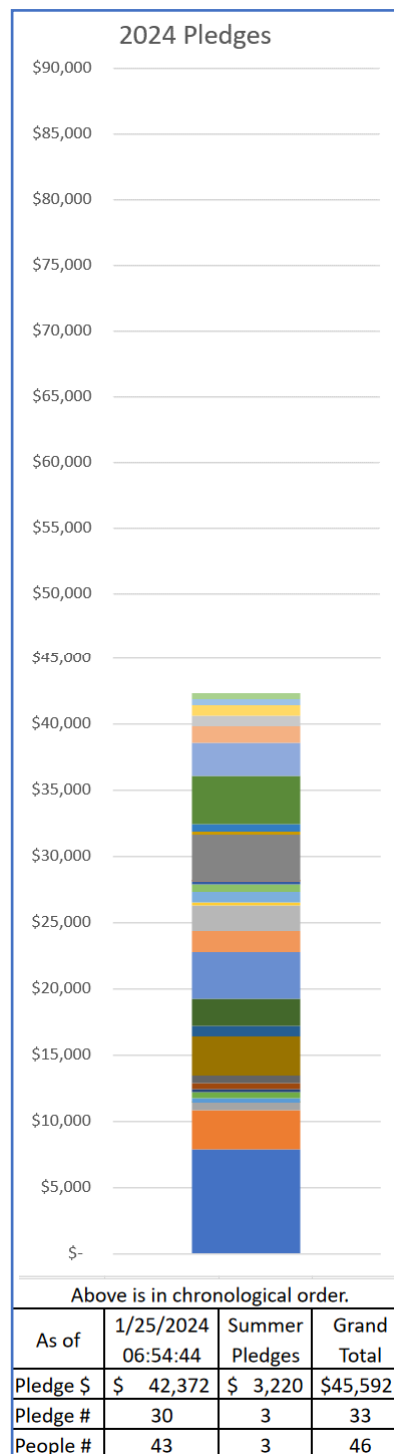
See the graphic to the right for the pledges that have been received to date. If you have not yet turned in your 2024 pledge, we ask that you do so by notifying:

Paul Stewart, Treasurer, at [Paul@PLPDD.com](mailto:Paul@PLPDD.com),

Peter Richards at [cobbleland@aol.com](mailto:cobbleland@aol.com), or

Ray Haskell at [Office@UnitarianChurchNantucket.org](mailto:Office@UnitarianChurchNantucket.org).

If you have already sent in your pledge, we thank you for your generous support. It takes all of us to support the Meeting House, our fine staff, the work within our congregation, and our work in the wider community. Your commitment and pledge each add up to make a difference and are very much appreciated.



## Annual Report of the Treasurer and Finance Committee

The Finance Committee advises the Board of Trustees in two main areas, our annual budget and our investments, and provides an annual report to the congregation. This is that annual report.

Your Treasurer’s main duty, according to our congregation’s Constitution (available in our Congregational Handbook on our website), is:

“Article 10: section 3. It shall be the duty of the treasurer to hold in custody all funds of the Church; to keep an account of all receipts and expenditures; to pay such bills as may be approved by the Board of Trustees [and/or the congregation]; and to render at the annual meeting, and at such other meetings as may be required, a full financial statement of the Church.”

This document is that “full financial statement of the Church” to annual meeting.

If you want just a general idea of our finances, here are some summaries:

**One sentence summary:** In 2023, a period of many changes, generous support, lowering inflation, and positive stock market growth, our congregational finances are in fine shape with a positive net worth of nearly \$2.2Million, although our annual budget was unbalanced for the first time in 10 years.

**Slightly longer summary:** As above, plus: The following table shows all our bank and investment account balances over several years. Row 16 shows the effect of the market on our Unrestricted Reserves investments. More details on our Unrestricted Reserves are on page 41. Row 21 is our ‘financial net worth’ (we have no debts).

### All Financial Assets at Institutions:

	Column: B	C	D	E	F	S	AF	AR
ROW.	All Financial Assets at	Institution	Account	Start Jan '20	Start Jan '21	Start Jan '22	Start Jan '23	End Dec '23
	Amounts directly from statements			'As of' date:	1/1/2020	1/1/2021	1/1/2022	1/1/2023
5	IRC Restricted Fund	Bank of America *3260	Immigrat. Res. Ctr.	opened 1/2021		\$ 12,836	\$ 8,780	\$ 3,719
10	General Operating \$\$	Bank of America *6218	Main Checking	opened 2020	\$ 35,779	\$ 132,628	\$ 96,176	\$ 41,106
11	General Operating \$\$	Bank of America *5490	Debit Card	opened 2020	\$ 11,326	\$ 9,094	\$ 7,005	\$ 6,726
12	General Operating \$\$	Rockland Trust/NanBank	Checking	\$ 198,829	\$ 168,551	\$ 99,158	\$ 102,730	\$ 73,716
13	General Operating \$\$	Subtotal (w/Funds)		Rows 10:12	\$ 198,829	\$ 215,656	\$ 240,880	\$ 205,911
14	Unrestricted Reserves	UUCommonEndowFund	est. 2/2015 \$100K	\$ 130,458	\$ 150,096	\$ 161,742	\$ 127,272	moved 1/2023
15	Unrestricted Reserves	Vanguard	all	\$ 1,590,170	\$ 1,953,598	\$ 2,075,319	\$ 1,636,342	\$ 1,963,873
16	Subtotal Unrestricted Reserves			Rows 14:15	\$ 1,720,628	\$ 2,103,694	\$ 2,237,061	\$ 1,763,614
17	Subtotal all Unrestricted (include General Op \$\$)			Rows 10:15	\$ 1,919,457	\$ 2,335,381	\$ 2,477,941	\$ 1,969,525
18	Restricted Reserves	TIAA Nuveen *8788	Organ Maintenance	\$ 82,863	\$ 91,839	\$ 98,103	\$ 85,680	\$ 94,714
19	Subtotal Restricted Accounts (separate accounts)			Rows 5:9 + 18	\$ 82,863	\$ 107,870	\$ 130,423	\$ 94,460
20	Subtotal all above			Rows 5:18	\$ 2,002,320	\$ 2,427,220	\$ 2,608,364	\$ 2,063,985
21	Subtotal all except 'IRC Restricted Fund'			Rows 10:18	\$ 2,002,320	\$ 2,411,189	\$ 2,576,043	\$ 2,055,206
22	vs prior visible	comparing row 21			\$ 408,869	\$ 164,854	\$ (520,838)	\$ 124,929
24								
25				Start Jan '20	Start Jan '21	Start Jan '22	Start Jan '23	End Dec '23
26	1/15/2024 2:54 PM	Consumer Price Index (CPI) = Inflation		256.974	260.474	278.802	296.797	306.746
27		inflation vs same date prior year		2.3%	1.4%	7.0%	6.5%	3.4%
29	Sanford Trust (not ours; right to income only) BNY-Mellon			\$ 231,962	\$ 224,998	\$ 269,311	\$ 214,370	\$ 211,923

The following pages discuss and detail certain specific information related to our financial situation. If you’re just interested in the recommended 2024 budget, skip to page 46 for a summary, or you can look at the entire detailed budget starting on the page after that.



## Details of the Treasurer’s and Finance Committee’s 2023 Annual Reports:

### 2023 Ministry

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Rev. Linda		Lay Led							Rev. Althea		

### Overview

2023 was a year of many changes and new efforts. We bid Rev. Linda and Gary a fond farewell as of the end of February. We hired a full time Business Manager on February 16. The Lay Led Committee did magnificent work covering every Sunday service through September. We were unable to attract an Interim Minister through the UUA’s annual Interim Search process, but then the Board hired Rev. Dr. Althea Smith through the UUA’s Contract Minister system to act as our Interim Minister. Rev. Althea started her ministry with us on October 1.

### Special 2023 Collections and Events

Some money is collected via collections, events, or sales with the understanding that we will donate the proceeds to specific recipients. That money is not included in our annual budget, either as income or expenses.

<b>Special Collections and Events: 2023</b>			
<b>Event</b>	<b>Date</b>	<b>Amount</b>	<b>Notes</b>
The <b>Nantucket Interfaith Council</b> appealed in June for food and supplies (and/or money for same) for the Food Pantry to help an influx of J-1 Visa students. Many congregants gave food and supplies, a few gave checks made out to the Food Pantry, and a couple wrote checks to the church. All that was delivered to the Food Pantry. Total value of all donations, cash, checks, and food and supplies, was around \$1,000.			
<b>Animal Blessing Service</b>	10/8/2023	\$ 350.00	proceeds to NiSHA
The <b>Special Holiday Collection</b> ran from 12/24/2023 to 1/15/2024. By 1/16/2024 it had raised \$1,006. The final amount will be accounted for in 2024 and will go to Addiction Solutions Nantucket.			

## Unrestricted Reserves

Referring again to the “All Financial Assets at Institutions” table on page 40, we can see that the bulk of our financial assets are in our Unrestricted Reserves (cell AR16 is 90% of the total in cell AR21). Our Unrestricted Reserves Policy is “to maintain the real value of our Unrestricted Reserves in perpetuity, while using as much as possible, as steadily as reasonably possible, to support our congregation’s activities”.

Here is a history of our Unrestricted Reserves from 2005 to now, with inflation adjustments. From this we can see that our policy (instituted in 2014) has been working over the years:

Row	Column: B	C	D	E	F	G	H
23	<b>Unrestricted Reserves, Nominal and Real in 12/31/2023 dollars</b>						
24		<b>'Nominal', as reported (less ATC)</b>		<b>'Inflation'</b>		<b>'Real', in 12/31/2023 \$\$ (adjusted for inflation)</b>	
25	<b>As of end of</b>	<b>Unrestricted Reserves (Vanguard + UUCEF - ATC)</b>	<b>Compare to prior year</b>	<b>Consumer Price Index (CPI-u)</b>	<b>rate of inflation vs prior</b>	<b>in 12/31/2023 \$\$</b>	<b>Compare to prior year</b>
26	12/31/2005	\$ 1,640,000		196.800		\$ 2,556,217	
27	----- several years of spending our principal -----						
28	12/31/2012	\$ 1,246,791	-24%	229.601	16.7%	\$ 1,665,708	-35%
29	12/31/2013	\$ 1,308,845	5%	233.049	1.5%	\$ 1,722,741	3%
30	12/31/2014	\$ 1,308,368	0%	234.812	0.8%	\$ 1,709,183	-1%
31	12/31/2015	\$ 1,333,163	2%	236.525	0.7%	\$ 1,728,961	1%
32	12/31/2016	\$ 1,395,649	5%	241.432	2.1%	\$ 1,773,211	3%
33	12/31/2017	\$ 1,577,136	13%	246.524	2.1%	\$ 1,962,406	11%
34	12/31/2018	\$ 1,485,469	-6%	251.233	1.9%	\$ 1,813,701	-8%
35	12/31/2019	\$ 1,720,628	16%	256.974	2.3%	\$ 2,053,888	13%
36	12/31/2020	\$ 1,985,694	15%	260.474	1.4%	\$ 2,338,444	14%
37	12/31/2021	\$ 2,131,128	7%	278.802	7.0%	\$ 2,344,728	0%
38	12/31/2022	\$ 1,636,342	-23%	296.797	6.5%	\$ 1,691,194	-28%
39	12/31/2023	\$ 1,882,073	15%	306.746	3.4%	\$ 1,882,073	11%
40	<b>v 12/31/2012</b>	\$ 635,282			33.6%	\$ 216,365	
41	<b>v 12/31/2005</b>	\$ 242,073			55.9%	\$ (674,144)	
45	11 years	averages: (rows 29:39)	4.5%		2.7%		1.8%
46	retained growth (2012 to now) in current \$\$:					\$ 216,365	
47	retained growth (2005 to now) in current \$\$:					\$ (674,144)	

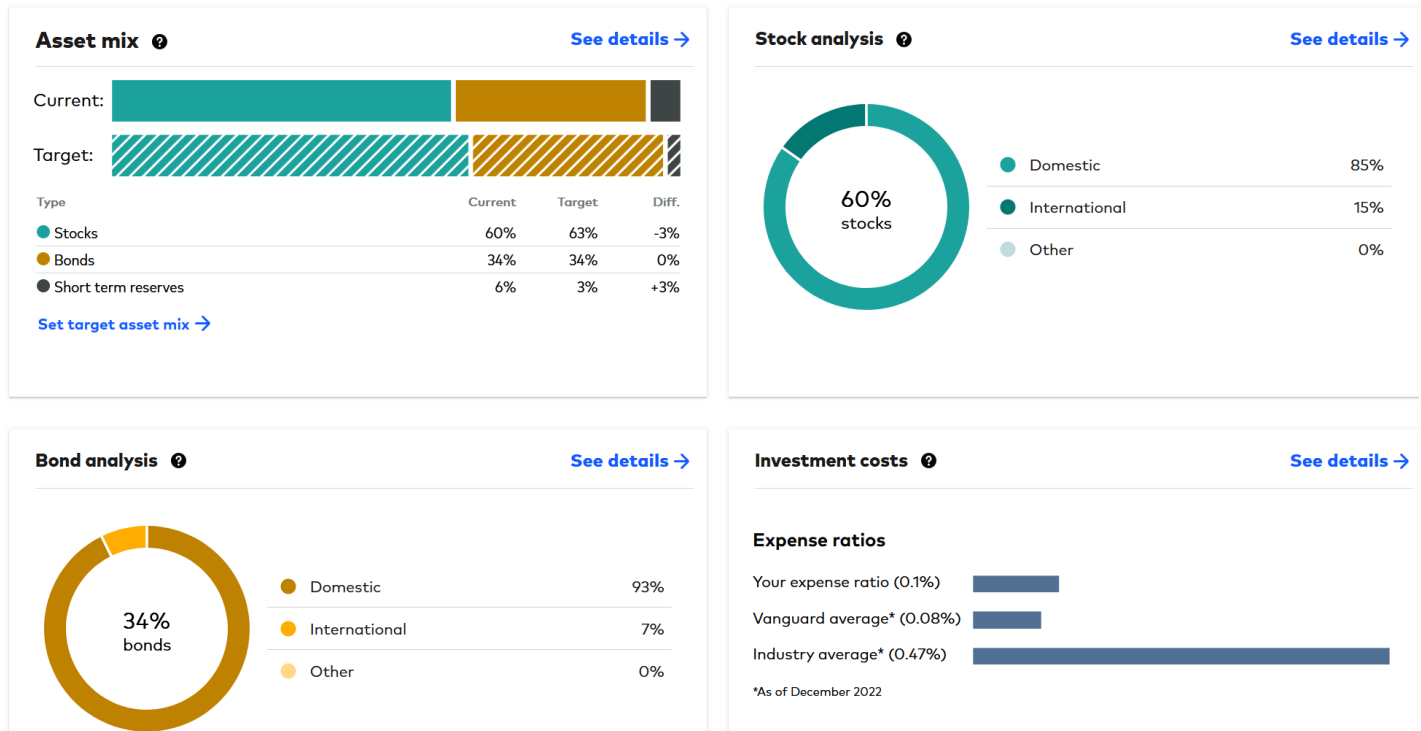
American Tower Corp (ATC) mistakenly paid us \$118K too much in 2019 and 2020, and then agreed to consider those as prepayments of the money they should have paid us through ~2028. They have stopped paying us until that prepayment is exhausted. We’re steadily metering those prepayments into our annual budget in the years when they should have come to us.

The “ATC” prepayment balance was \$81,799 as of the end of 2023 (not included above).

## Investments

From early 2015 to early 2023 the majority of our Unrestricted Reserves were invested at Vanguard, and a smaller amount at the UU Common Endowment Fund (UUCEF). In late 2022 our Finance Committee and Board recommended that we simplify our affairs by merging the money from the UUCEF into our larger investment account at Vanguard. That merging was completed in January, 2023.

Our Vanguard account is now 100% of our Unrestricted Reserves, our main investments:



The value of the stock portion of our account mostly follows the value of the US and foreign stock markets. The US stock market has been growing pretty steadily since the Global Financial Crisis of 2009 →

Market Summary > Dow Jones Industrial Average

**38,001.81**

+36,771.81 (2,989.58%) ↑ all time

Jan 22, 5:04 PM EST • Disclaimer

1D | 5D | 1M | 6M | YTD | 1Y | 5Y | Max



## Restricted Funds

Our Restricted Funds are those that have been set aside and designated for a particular purpose. The purpose of the Funds that are “R”estricted can be changed by the congregation or Board. Funds that are marked “RD” are Restricted by Donor and the permission of all donors must be obtained before a Fund’s purpose can be changed.

The money of these Funds is located in our two main checking accounts (rows 10 and 12 in the All Financial Assets at Institutions table on page 40). The IRC Restricted Fund is in a separate bank account (row 5 on page 40). The Organ Maintenance Fund has two parts, a modest working balance in this table plus a separate investment account at TIAA (row 18 on page 40).

Row	Column	B	C	D	E	F	G	H
3	<b>Restricted Funds in our bank accounts</b>				<b>1/1/2023</b>	<b>Deposit</b>	<b>Withdraw</b>	<b>12/31/2023</b>
4	Caring Team			R	\$ 752	\$ 300	\$ (112)	\$ 940
5	Chadwick Music	(est. 12/2022)		RD	\$ 2,500	\$ -	\$ (800)	\$ 1,700
6	Coffee Hour Supplies			RD	\$ 927	\$ 93	\$ (153)	\$ 867
7	COVID Recovery, Hybrid, Operations, ...	(est. 8/2021)		R	\$ 3,429	\$ -	\$ -	\$ 3,429
8	Festival of Trees	(est. 12/2022)		R	\$ 150	\$ -	\$ -	\$ 150
9	Food Rescue Fridge (sold to community garden)			RD	\$ 676	\$ 4,136	\$ (4,811)	\$ -
10	Growing Connections between Friends and Membe			R	\$ 1,574	\$ 600	\$ (20)	\$ 2,154
11	Hanner Memorial Music	(est. 8/2018)		RD	\$ 3,169	\$ -	\$ -	\$ 3,169
12	Immigrant Resource Center (separate)	(est. 2017)		RD				
13	Lay Led Committee			R	\$ 1,300	\$ 500	\$ (200)	\$ 1,600
14	Meeting House Capital Maintenance			R	\$ 24,037	\$ -	\$ -	\$ 24,037
15	Minister's Discretionary			RD	\$ 6,520	\$ -	\$ -	\$ 6,520
16	Noonday Concerts			R	\$ 323	\$ 1,626	\$ (1,200)	\$ 749
17	Organ Maintenance	(and at TIAA)		RD	\$ 1,078	\$ -	\$ (1,278)	\$ (199)
18	Organ Playing			RD	\$ 1,500	\$ -	\$ (1,050)	\$ 450
19	Parsonage Capital Maintenance			R	\$ 58,470	\$ 6,778	\$ (66,937)	\$ (1,690)
20	WE/RE Committee			R	\$ 528	\$ -	\$ -	\$ 528
21	Remembrance Garden	(est. 2/2021)		RD	\$ 4,565	\$ 1,300	\$ (1,223)	\$ 4,642
22	Sabbatical Provision	(est. 1/2015)		R	\$ 9,282	\$ -	\$ -	\$ 9,282
23	Social Action (but not IRC)			R	\$ 1,819	\$ 4,811	\$ (100)	\$ 6,530
24	Susie Jarrell Music (3.5% from invested \$10,380)	(est. 7/2022)		R	\$ -	\$ 363	\$ -	\$ 363
25	<b>Total Restricted Funds</b>				<b>\$ 122,600</b>	<b>\$ 20,507</b>	<b>\$ (77,885)</b>	<b>\$ 65,222</b>
	Restricted as to purpose (can change)			R	\$ 101,664	\$ 14,978	\$ (68,569)	\$ 48,073
	Restricted by Donor (cannot change)			RD	\$ 20,936	\$ 5,529	\$ (9,315)	\$ 17,149

Note we spent plenty of money from the Parsonage Capital Maintenance Fund on our parsonage doing necessary maintenance (downspouts, window and door repairs, new storm windows, interior and exterior painting, plumbing, etc.) while it stood vacant from March to September.

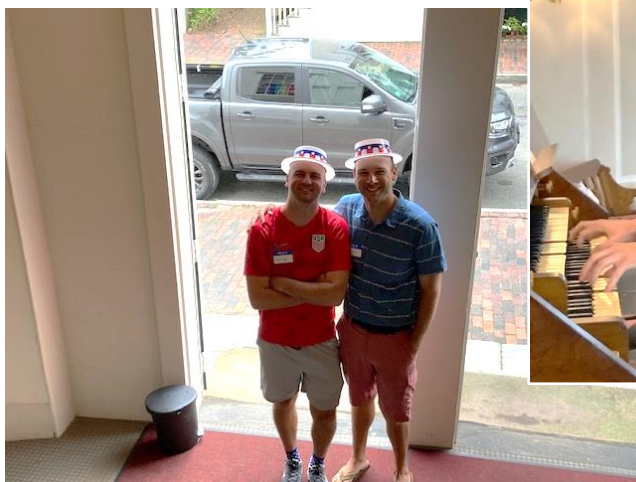
The Sabbatical Provision Fund is money the congregation set aside to provide for a Sabbatical Minister if Rev. Linda took the sabbatical leave she was entitled to. The UUA recommends that this can be repurposed to help with the search for or relocation of another minister, but our congregation has the right to redesignate it for any purpose.

We are still working on finalizing details of the ‘Actuals’ for the 2023 Annual Budget. Since the larger transactions (e.g., payroll is 2/3rds of our expenses, and are exactly accounted for by our payroll processor) are well-known, it is only certain small amounts that require further refinement. Our deficit for 2023 will be \$62,000 ± \$3,000.

The recommended 2024 annual budget is discussed, summarized, and detailed on the following pages.

Respectfully,  
Your 2023 Finance Committee:  
Randi Allfather  
Bob Middleton  
Susan Richards, President

Rev. Althea Smith, non-voting  
Paul Stewart, Treasurer and Chair of the FinCom  
Jim Sulzer



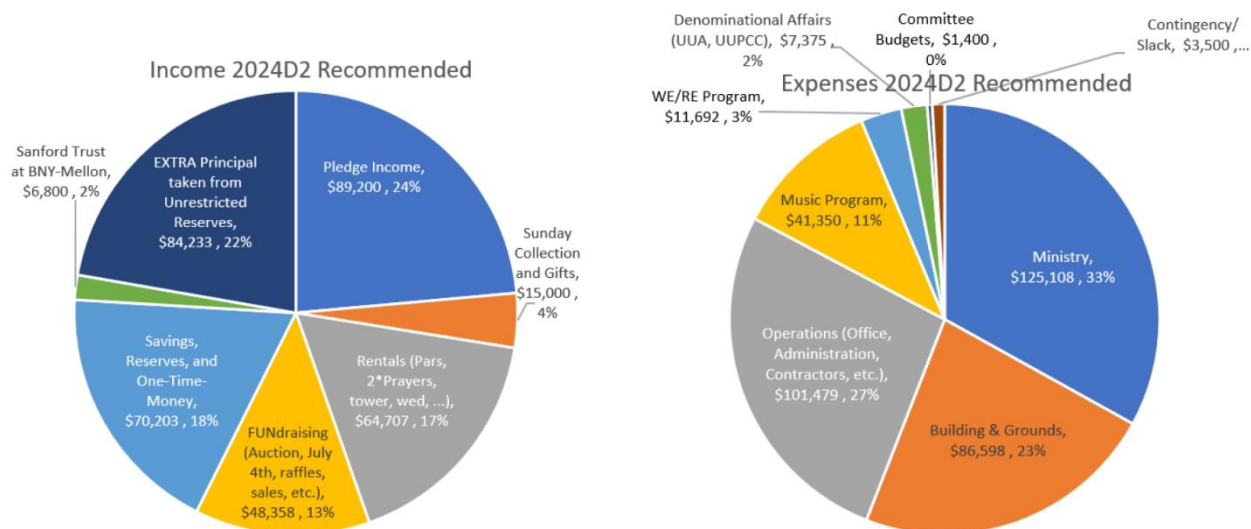
July 4<sup>th</sup> Event

## 2024 Recommended Budget

This budget material has been posted on our website since January 9 and we held well-attended ‘Congregational Conversations’ on January 21 (in person) and January 22 by Zoom to discuss our finances and budget.

Ray Haskell started as our full time Business Manager on February 16, 2023. Our goal was to relieve the administrative and business work of our congregation from our Minister and our Treasurer, and that goal has been successfully achieved. Thank you, Ray, for your good work for us!

The recommended 2024 budget includes raises of 4% for all employees; that raise will apply to our minister in August.



After the budget was approved by the Board on December 13 and posted on our website on January 9, we received notice that our Church Mutual insurance premiums for 2024-2025 will be fractionally less than what is projected; that’s good news but not significant enough to amend the recommended budget now.

On the following pages are the 2023 Annual Budget document as posted on our website and as unanimously recommended by our Finance Committee and Board of Trustees.

From the Finance Committee's report to the December 13, 2023, Board meeting:

#### Finance Committee

1. General Purpose: The FC is responsible for making recommendations to the Board on all matters relating to Church finances, but it is not a canvas, pledge, or fundraising committee.
2. Specific Responsibilities: The responsibilities of the FC include but are not limited to the following:
  - a) Reviewing the Church's goals and needs as defined by the Board and articulating these in terms of short- and long-term financial strategies
  - b) The Finance Committee shall develop the Church's annual budget in conjunction with the various departments and committees, within the context of the actual financial realities and long term goals, and present a budget to the Board of Trustees for approval by December 15, and then to the congregation two weeks prior to the annual meeting.
  - c) Monitoring the Church's assets, liabilities, income and expenses and making periodic (at least annual) reports to the Board and the congregation
  - d) Advising the Board on investment strategies and long-term needs for raising funds. Arranging for an annual audit or review of the Church's financial records

from our Congregational Handbook on our website

Our 2023 Finance Committee consists of Randi Allfather, Bob Middleton, President Susan Richards, Rev. Althea Smith (non-voting), Treasurer Paul Stewart, Chair, and Jim Sulzer.

Pursuant to the above, and particularly 2.b), the FinCom held a Zoom meeting from Noon to 2:30PM on November 3 to discuss our finances and our 2024 budget recommendation in detail. Also attending that meeting were Trustees Carol, Suse, and Lora.

Then the FinCom zoomed on December 5 from Noon to 1PM to discuss the 2024 budget and agree on their recommendation to the Board (so it could be distributed to the Trustees before our Board meeting on December 13).

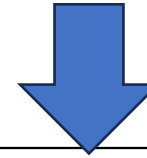
**The FinCom was unanimous in its recommendation of the 2024 budget in this document to the Board. However, no one would say it is a satisfactory or sustainable model for the long term.**

Paul explained that we are in a time of transition between called ministers and in our administration. We bid adieu to Rev. Linda (and Gary) at the end of February, 2023. We had a difficult time attracting an interim minister to help us in this transition, and we spent a lot of effort this year in that effort. Rev. Althea started after the usual Interim Minister start. We are mainly trying to keep things moving forward, including several unusual expenses (for example, we must budget \$10-\$15K of relocation costs for each of the Interim minister and the called minister). We'll have to work with our called minister to adjust our future expenses to our income.

At its December 13 meeting, after discussion, the Board voted unanimously to "(1) accept the Finance Committee's recommendation for the 2024 annual budget in column AO, (2) accept responsibility for the various FUNdraisers (especially the July 4<sup>th</sup> plan), and (3) distribute this budget to the congregation in early January so it can be the topic of one or more congregational discussions before Annual Meeting."

The recommended 2024 annual budget, details, and support materials are on the following pages.

The annual budget recommended unanimously by both the Finance Committee and the Board of Trustees:



row	Summaries:	Column AD: 2022B Budget	Column AK: 2023B Budget	Column AM: 2023 Actual	Column AO: 2024D2	Column AO - Column AK
209	Pledge Income Total	\$ 109,500	\$ 109,500	Work in progress	\$ 89,200	\$(20,300) -19%
210	Sunday Collection and Gifts Total	\$ 17,000	\$ 15,800		\$ 15,000	\$ (800) -5%
211	Rentals (Pars, 2*Prayers, tower, wed, ...) Total	\$ 72,098	\$ 67,899		\$ 64,707	\$ (3,192) -5%
212	FUNdraising (Auction, July 4th, raffles, sales, etc.) Total	\$ 26,116	\$ 18,191		\$ 48,358	\$ 30,168 166%
213	Savings, Reserves, and One-Time-Money Total	\$ 79,275	\$ 73,945		\$ 70,203	\$ (3,742) -5%
214	Sanford Trust at BNY-Mellon	\$ 9,000	\$ 6,800		\$ 6,800	\$ - 0%
215	EXTRA Principal taken from Unrestricted Reserves	\$ -	\$ 92,472		\$ 84,233	\$ (8,239) -9%
216	<b>Income Total</b>	\$ 312,989	\$ 384,607		\$ 378,502	\$ 86,367 30%
217						
218	<b>Expenses:</b>	Based on 3Q2023 inflation of 3.7%, raises for all employees are computed at 4.0%				
219	Ministry Total	\$ 123,505	\$ 139,069	Work in progress	\$ 125,108	\$(13,960) -10%
220	Building & Grounds Total	\$ 78,451	\$ 87,039		\$ 86,598	\$ (442) -1%
221	Operations Total (Office, Administration, Contractors, etc)	\$ 55,729	\$ 99,098		\$ 101,479	\$ 2,381 2%
222	Music Program Total	\$ 36,421	\$ 39,649		\$ 41,350	\$ 1,701 4%
223	WE/RE Program Total	\$ 8,994	\$ 11,350		\$ 11,692	\$ 342 3%
224	Denominational Affairs (UUA, UUPCC) Total	\$ 6,563	\$ 7,078		\$ 7,375	\$ 297 4%
225	Committee Budgets Total	\$ 1,400	\$ 1,400		\$ 1,400	\$ - 0%
226	Contingency/Slack	\$ 1,927	\$ 3,107		\$ 3,500	\$ 393 13%
227	<b>Expenses Total</b>	\$ 312,989	\$ 387,790	\$ 378,502	\$ (9,288) -2%	

Paul's comments: You'll immediately note that this budget is significantly out of balance, only brought back into apparent balance by the red "EXTRA Principal taken from the Unrestricted Reserves". Unfortunately, that "EXTRA" is poorly named, we had a significantly unbalanced budget in 2023 and took no extra principal out of our Unrestricted Reserves (we instead didn't spend as much as was budgeted and we drew down our bank accounts somewhat. In fact, our Unrestricted Reserves and our 'financial net worth' grew in 2023; more on that on the last page of this document).

This budget provides for a full time Minister and a full time Business Manager and the same hours for all our other employees for all of 2024.

This budget gives all employees a 4% raise (although that raise takes effect starting on August 1 for our Minister).



Here is the detailed budget that summarizes into the preceding table. This shows all our annual budget lines. It can best be used to answer the question “what’s in this summary category?”.

	A	B	C	D	E	AD	AK	AM	AO	AQ	AR
1					Income - Expense ==>	\$ 0	\$ (92,472)		\$ (84,233)	AO	AK
2	Prior Annual General Operating Budgets; Column AO recommended for 2024					2022B	2023B	2023	2024D2	Column AO	
3						Budget	Budget	Actual	Recommended	- Column AK	
4	Income	Pledges	Pledge receipts for prior years	before Year, received in Year	before 2022, received in '22	\$ 1,500	\$ 1,500	Work in progress	\$ 1,500	0	0%
5			Pledge receipts for budget year	'For Year' received in Year-1 or Year	For 2022 received in '21 or '22	\$ 108,000	\$ 108,000		\$ 87,700	(20,300)	-19%
8	4:7	<b>Pledge Income Total</b>				\$ 109,500	\$ 109,500		\$ 89,200	(20,300)	-19%
9		Sunday Collection	('Special' or 'Share-the-Plate' Collections <b>not</b> included here)			\$ 10,000	\$ 8,800		\$ 8,000	(800)	-9%
10		Gifts (unrestricted/undirected)				\$ 7,000	\$ 7,000		\$ 7,000	0	0%
11		Restricted/directed contributions	Not part of General Operating Budget, restricted to other uses, see 'Restricted Funds'								
12		Special Collections	Not part of General Operating Budget, restricted to specific purpose of Collection								
13	9:12	<b>Sunday Collection and Gifts Total</b>				\$ 17,000	\$ 15,800		\$ 15,000	(800)	-5%
14		<b>Rentals</b>	Parsonage	'virtual parsonage rent', per Minister's Agreement		\$ 27,500	\$ 27,500		\$ 27,500	0	0%
15			Congregation Shirat HaYam			\$ 11,000	\$ 16,000			(16,000)	-100%
16			Servants Heart International Ministries (SHIM)		est. 2020	\$ 10,482	\$ -			0	
17			New Prayer Group (NPG)	3H/W*\$40/Hour*53Weeks=\$6,360	est. 2022		\$ 3,432		\$ 6,240	2,808	82%
18			Tuesday Prayer Group (started 7?/2023)		est. 2023				\$ 5,200		
19			Masjid Al-Bahr	Mosque of the Ocean	est. 2016	\$ 500	\$ 500	\$ 500	0	0%	
20			GTP/ATC 'Additional Income'	Using 8/2019 to 12/2020 pre-payments to 'fill the gap'		\$ 12,067	\$ 12,067	\$ 12,067	0	0%	
21			HillTownNetworks.com (previously AccessPlus, CountryRoads, WiBlast)			\$ 1,800	\$ 1,800	\$ 1,800	0	0%	
22			Town Clock	2019: \$1250, 2020 \$1500, 2022 \$1600		\$ 1,600	\$ 1,600	\$ 1,800	200	13%	
23			Town wireless emergency network		increased 2020	\$ 2,100	\$ 2,100	\$ 2,100	0	0%	
24			Nantucket Energy network		increased 2021	\$ 1,900	\$ 1,900	\$ 2,000	100	5%	
25		all are net of related expenses	Weddings (inc. deposits in year)		hard to separate out	\$ 2,150	\$ -	\$ 3,250	3,250		
26		all are net of related expenses	other Sanctuary, Hendrix Hall, and/or AR rentals		hard to separate out	\$ 1,000	\$ 1,000	\$ 2,250	1,250	125%	
27	14:26	<b>Rentals (Pars, 2*Prayers, tower, wed, ...) Total</b>				\$ 72,098	\$ 67,899	\$ 64,707	(3,192)	-5%	
29		<b>FUNdraising</b>	all are net of related expenses	July 4th Celebration	Board of Trustees	\$ 10,000	\$ -	\$ 30,000	30,000		
31				Quilt Raffle	Susan Kirk	\$ 1,193	\$ 1,639	\$ 2,379	740	45%	
32				Goods and Services Auction		\$ 12,714	\$ 14,107	\$ 13,179	(928)	-7%	
34				Yard sale	Loretta	\$ 1,208	\$ 1,445	\$ 1,800	355	25%	
35				Holiday Craft Fair	Saturday AM craft group	\$ 1,000	\$ 1,000	\$ 1,000	0	0%	
37	28:36	<b>FUNdraising (Auction, July 4th, raffles, sales, etc.) Total</b>				\$ 26,116	\$ 18,191	\$ 48,358	30,167	166%	
38		Income from Savings	Bank accounts interest	BankOfAmerica and RocklandTrustNantucketBank		\$ 10	\$ 10	\$ 13	3	35%	
39		Use of One-Time money	2020 PPP \$24,630, forgiven 2021; 3 year semi-soft landing: \$8,621 in '22 and \$6,158 in '23			\$ 8,621	\$ 6,158		(6,158)	-100%	
40		Use of One-Time money	use 2021 Surplus as 2022 income to cover 2022 Insurance Premium jump			\$ 3,574	\$ -		0		
42		\$ 70,190	Reserves ('Endowment') 3Y average of 3Q: for general budget	3.69%	\$ 1,900,733	\$ 60,363	\$ 60,999	\$ 63,171	2,172	4%	
43			Reserves ('Endowment') 3Y average of 3Q: for capital maintenance only!	10%		\$ 6,707	\$ 6,778	\$ 7,019	241	4%	
44	38:43	<b>Savings, Reserves, and One-Time-Money Total</b>				\$ 79,275	\$ 73,945	\$ 70,203	(3,742)	-5%	
45		Sanford Trust at BNY-Mellon	Principal balance \$211,923		distribution / balance = 3.2%	\$ 9,000	\$ 6,800	\$ 6,800	0	0%	
46	38:45	<b>Bank accounts, Reserves/Endowment, OTM, and Sanford Trust Total</b>				\$ 88,275	\$ 80,745	\$ 77,003	(3,742)	-5%	
47		<b>Income Total</b>				\$ 312,989	\$ 292,135	\$ 294,269	2,134	1%	
48											

	A	B	C	D	E	AD	AK	AM	AO	AQ	AR
1					Income - Expense ==>	\$ 0	\$ (92,472)		\$ (84,233)	AO	AK
2	Prior Annual General Operating Budgets; Column AO recommended for 2024					2022B	2023B	2023	2024D2	Column AO	
3						Budget	Budget	Actual	Recommended	- Column AK	
50	Expenses	Ministry	Minister	Salary+Housing (S+H)	Salary (+4% in August)	\$ 53,796	\$ 53,796	Work in progress	\$ 54,692	897	2%
51				'virtual parsonage rent'	Housing	\$ 27,500	\$ 27,500		\$ 27,500	0	0%
52	50:51			Salary+Housing subtotal	'S+H'	\$ 81,296	\$ 81,296		\$ 82,192	897	1%
53		green cells are multiples of 'S+H'		Retirement Plan UUA	10.000%	\$ 8,130	\$ 8,130		\$ 8,219	90	1%
54				In Lieu of Employer's FICA = SECA	7.650%	\$ 6,219	\$ 6,219		\$ 6,288	69	1%
55			2024 specific to Rev. Althea	Health Insurance		\$ 13,727	\$ 18,291		\$ 6,600	(11,691)	-64%
56			2024 specific to Rev. Althea	Dental Insurance inc. In Health		\$ 1,440	\$ 1,440		\$ -	(1,440)	-100%
57				Life, AD&D Insurance UUA	0.840%	\$ 683	\$ 683		\$ 690	8	1%
58				Long Term Disability UUA	1.300%	\$ 1,057	\$ 1,057		\$ 1,069	12	1%
59				Minister's Compensation Package Total		\$ 112,551	\$ 117,115		\$ 105,058	(12,057)	-10%
60				Workers Comp insurance share		\$ 695	\$ 695		\$ 695	0	0%
61			\$1K/year for interim	Sabbatical Coverage Provision	(UUA Interim Sabbatical Fund)	\$ -	\$ 1,000		\$ 1,000	0	0%
62			interim relocation/transportation			\$ -	\$ 10,000		\$ 8,000	(2,000)	-20%
63				Reimburse Professional Expenses	10.8%	\$ 8,758	\$ 8,758		\$ 8,855	97	1%
64	50:63			Minister Total		\$ 122,005	\$ 137,568		\$ 123,608	(13,960)	-10%
66				Guest Sunday Service Speakers	(some paid, some volunteer)	\$ 1,500	\$ 1,500		\$ 1,500	0	0%
67											
68	50:66			Ministry Total (includes Guest Speakers \$1.5K, Relocation \$10K, Sabbatical Coverage Provision \$1K, and virtual parsonage rent \$27.5K)		\$ 123,505	\$ 139,068		\$ 125,108	(13,960)	-10%
70		Building & Grounds (B&G)	Parsonage	Capital Maintenance Provision (roof, siding, windows, heat, etc.)		\$ 6,707	\$ 6,778		\$ 7,019	241	4%
71				Fire and Liability Insurance	15.0%	\$ 5,330	\$ 5,863		\$ 5,906	43	1%
72				Repairs and Maintenance	(annual)	\$ 2,700	\$ 2,700	\$ 2,700	0	0%	
73				Utilities	Electricity	\$ 1,000	\$ 1,300	\$ 1,500	200	15%	
74					Fuel Oil, or Conserve!	\$ 4,000	\$ 5,000	\$ 6,000	1,000	20%	
76				Parsonage + Meeting House split 50:50	Solid waste + landfill	\$ 1,050	\$ 1,200	\$ 1,200	0	0%	
78					Water + Sewer	\$ 1,270	\$ 1,397	\$ 1,397	0	0%	
79					Wireless phone/cable	\$ 950	\$ 950	\$ 2,400	1,450	153%	
80	73:79			Utilities Total (oil heat, water&sewer, electricity, phone, etc.)		\$ 8,390	\$ 9,847	\$ 12,497	2,650	27%	
81	70:80			Parsonage Subtotal (includes Provision for Capital Maintenance)		\$ 23,127	\$ 25,187	\$ 28,122	2,934	12%	
86	83:85		Meeting House	'inside' Sexton Wages+FICA+WComp @ 5.5hr/wk*\$30.76/hr*52wk/yr		\$ 8,775	\$ 9,442	\$ 9,807	364	4%	
91	83:90			Sextons Subtotal Salary+FICA+Worker's Comp		\$ 8,775	\$ 9,442	\$ 9,807	364	4%	
92				Sexton via 1099 for certain events	Baccalaureate, ??	\$ -	\$ -	\$ -	0		
93				Fire and Liability Insurance	85.0%	\$ 30,203	\$ 33,223	\$ 33,466	243	1%	
95				Fire Alarm Monitoring Service (wireless to Wayne Alarm)		\$ 1,000	\$ 1,100	\$ 1,100	0	0%	
96				Repairs and Maintenance	Building Maintenance & Repa	\$ 4,528	\$ 4,528	\$ 4,528	0	0%	
97					Cleaning & Sexton Supplies	\$ 1,500	\$ 1,500	\$ 1,000	(500)	-33%	
98					Equipment Repair/Replace	\$ 843			0		
99					Inspections (CO, Fire)	\$ 125	\$ 275	\$ 275	0	0%	
100	96:99			Repairs and Maintenance Total		\$ 6,996	\$ 6,303	\$ 5,803	(500)	-8%	
104	101:103			Utilities Total (Electricity (heat/cool/light), Solid waste, Water + S		\$ 8,350	\$ 8,600	\$ 8,300	(300)	-3%	
105	83:104		Meeting House Total			\$ 55,324	\$ 58,669	\$ 58,476	(193)	0%	
106	70:105	Building & Grounds Total				\$ 78,451	\$ 83,856	\$ 86,598	2,742	3%	

	A	B	C	D	E	AD	AK	AM	AO	AQ	AR
1					Income - Expense ==>	\$ 0	\$ (92,472)		\$ (84,233)	AO	AK
2	Prior Annual General Operating Budgets; Column AO recommended for 2024					2022B	2023B	2023	2024D2	Column AO	
3						Budget	Budget	Actual	Recommended	- Column AK	
115	108:114	Operations (Office, Admin, ...)	Office Manager Total Wages, Benefits, FICA, and Worker's Comp		14hr/wk*\$25.50/hour*52	\$ 37,293	\$ 20,199	Budgeted full year Office Mgr and additional for Business Mgr to sum to \$60K annual.	\$ -		
116	48.00		Business Manager	Salary			\$ 31,534		\$ 62,400	30,866	98%
117		2/1/2023	Budget assumed hire	Retirement Plan UUA	10.000%		\$ 5,840		\$ 6,240	400	7%
118		2/16/2023	Actual hire Ray Haskell	Health and dental	assume-UUA		\$ 13,938		\$ 7,000	(6,938)	-50%
119				Life, AD&D Insurance UUA	0.840%		\$ 491		\$ 524	34	7%
120	45.43	12/31/2023	hired weeks in all 2023	Long Term Disability UUA	1.300%		\$ 759		\$ 811	52	7%
121	13.00	10/1/2023	hired weeks in 4Q23	Employer's FICA	7.650%		\$ 3,047		\$ 4,774	1,726	57%
122				Workers Comp insurance share			\$ 427		\$ 427	0	0%
123	116:122		Business Manager total Salary, Benefits, FICA, and Workers Comp			\$ -	\$ 56,036		\$ 82,176	\$26,140	\$ 0
124	108:123	Total Office Manager and Business Manager				\$ 37,293	\$ 76,234		\$ 82,176	\$ 5,942	\$ 0
125		Dues, permits, ...	Nantucket Chamber of Commerce, Animal Blessing, etc.			\$ 150	\$ 195		\$ 720	525	269%
126		CC/Stripe/Tithe.ly/PayPal costs	annual costs plus some transaction fees			\$ 1,500	\$ 1,500		\$ 1,560	60	4%
127		Office Expenses	Equipment: Copier Service + Supplies			\$ 250	\$ 250		\$ 250	0	0%
128			ComCast Internet,Phone	Meeting House only		\$ 3,519	\$ 3,519	\$ 4,000	481	14%	
129			Postage, Shipping & Delivery			\$ 300	\$ 400	\$ 400	0	0%	
130			programs, checks, ...	Supplies and printing		\$ 1,000	\$ 1,500	\$ 1,332	(168)	-11%	
131	127:130		Office Expenses Total			\$ 5,069	\$ 5,669	\$ 5,982	313	6%	
132			Payroll Processing & Tax Prep fees			\$ 2,117	\$ 3,300	\$ 3,500	200	6%	
133			Website hosting and support	and Zoom costs		\$ 1,000	\$ 1,000	\$ 1,221	221	22%	
134			Front flowers	est. 2020 (Meeting House, Parsonage, and Sanctuary)		\$ 500	\$ 500	\$ 200	(300)	-60%	
135	new		Hybrid Sunday Service technology operator			\$ 3,100	\$ 5,200	\$ 3,120	(2,080)	-40%	
136	separate		Outside computer tech support (computers, networks, printers, ...)			\$ 500	\$ 500	\$ 500	0	0%	
137	separate		Bookkeeper	(expert support)		\$ 4,500	\$ 5,000	\$ 2,500	(2,500)	-50%	
138	108:137	Operations Total (Office, Administration, Contractors, etc.)				\$ 55,729	\$ 99,098	\$ 101,479	2,381	2%	

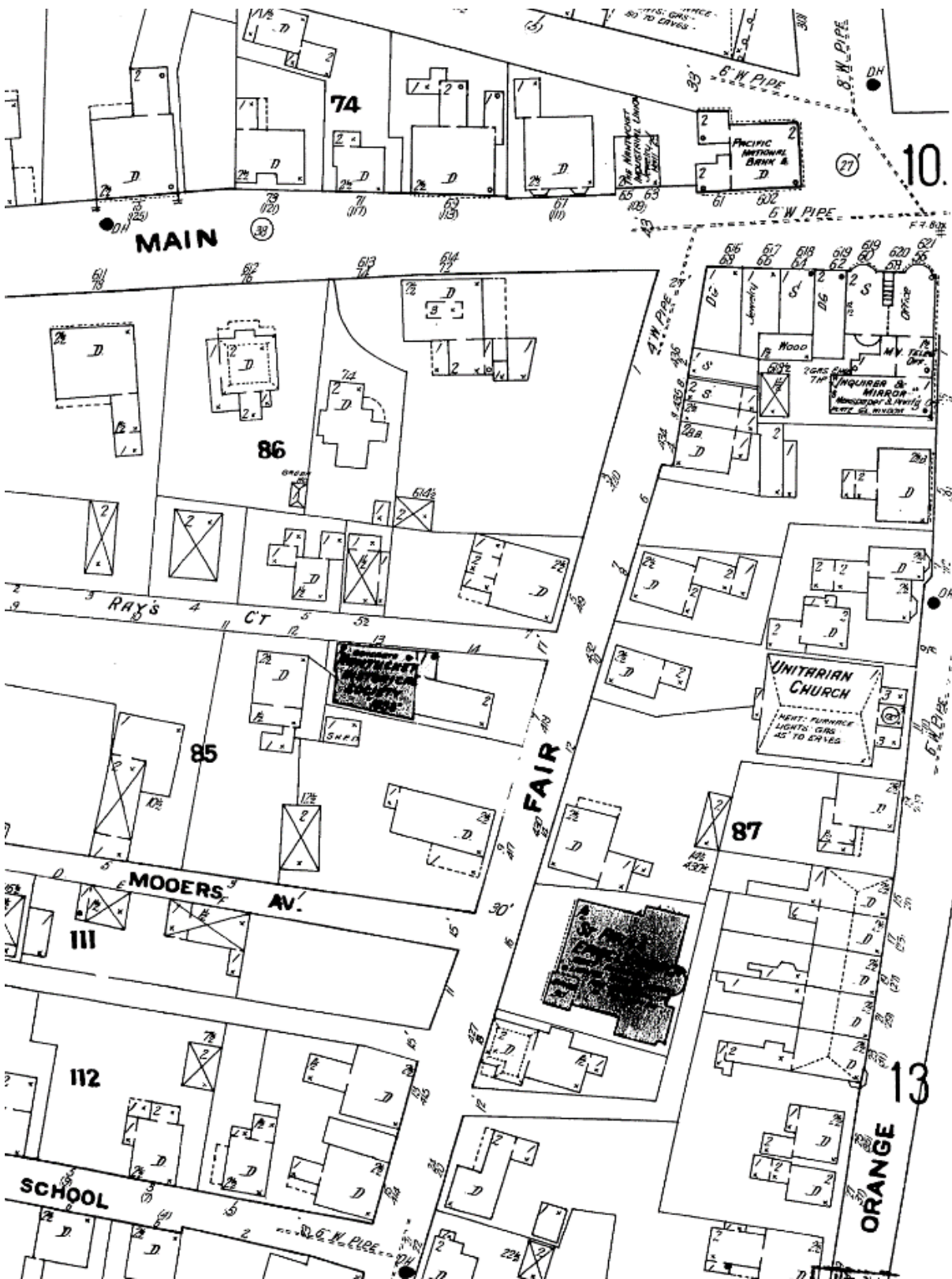
	A	B	C	D	E	AD	AK	AM	AO	AQ	AR
1					Income - Expense ==>	\$ 0	\$ (92,472)		\$ (84,233)	AO	AK
2	Prior Annual General Operating Budgets; Column AO recommended for 2024					2022B	2023B	2023	2024D2	Column AO	
3						Budget	Budget	Actual	Recommended	- Column AK	
147	140:146	Music Program	Director Total Wages, Benefits, FICA, and Worker's Comp		14hr/wk*\$47.13/hr*52wk/yr	\$ 32,531	\$ 35,759	Work in progress	\$ 37,180	1,421	4%
148			Professional Development		\$90/year = uumn.org	\$ 1,090	\$ 1,090		\$ 1,090	0	0%
149			Replacement Musician (1099)							0	
150			paid sick day replacement (1099)		2 Sundays a year; else a cappella	\$ 500	\$ 500		\$ 500	0	0%
151			Paid Vacation replacement (1099)		2 weeks per year	\$ 500	\$ 500		\$ 500	0	0%
152			Guest Supplemental Musicians (1099)		Actual Guest Supplemental Musicians, players and singers	\$ 1,000	\$ 1,000		\$ 1,250	250	25%
153			Organ playing first funded from Organ Playing Fund, q.v.			\$ -	\$ -			0	
154			Pianos - Maintenance and Tuning			\$ 500	\$ 500		\$ 530	30	6%
155			Organ Maintenance and Tuning is separate Restricted Fund, q.v.			\$ -	\$ -			0	
156			Sheet Music and supplies			\$ 300	\$ 300		\$ 300	0	0%
157	140:156	Music Program Total				\$ 36,421	\$ 39,649		\$ 41,350	1,701	4%
162	159:161	WE Religious Exploration Program	Children and Youth Pgm Director Wages, FICA, and Worker's Comp		5hr/wk*\$28.92/hr*52wk/yr	\$ 7,842	\$ 8,621		\$ 8,963	342	4%
163		World Explorers (WE)	Children and Youth Pgms Director Professional Development			\$ 150	\$ 150		\$ 150	0	0%
167	164:166		Assistant Total Wages, FICA, and Worker's Comp		2hr/wk*\$20/hr*52wk/yr	\$ 702	\$ 2,279		\$ 2,279	0	0%
168	159:167		Subtotal all teachers above			\$ 8,694	\$ 11,050		\$ 11,392	342	3%
169			Food, supplies, volunteer training, expenses			\$ 300	\$ 300		\$ 300	0	0%
170	159:169	WE/RE Program Total				\$ 8,994	\$ 11,350	\$ 11,692	342	3%	
172		Denominational Affairs	UUA+NERegion Dues: new system, 300% increase, capped at 10%/year; we: Personnel cost increase			\$ 6,488	\$ 7,003	\$ 7,300	297	4%	
173			UU Partner Church Council Membership			\$ 75	\$ 75	\$ 75	0	0%	
174	172:173	Denominational Affairs (UUA, UUPCC) Total	Denominational Affairs is 1.9% of our total budget			\$ 6,563	\$ 7,078	\$ 7,375	297	4%	
176		Committee Budgets	Social Action (7th Principle Project, Food Rescue, Immigration Resource Center, ...)			\$ 350	\$ -	\$ -	0		
177		These add to their corresponding Restricted Funds	Growing Connections between Friends and Members (nee Membership)			\$ 250	\$ 600	\$ 600	0	0%	
178			Caring Team	Cards, Yarn, Meals, etc.		\$ 350	\$ 300	\$ 300	0	0%	
179			Lay Led			\$ 450	\$ 500	\$ 500	0	0%	
180	176:179	Committee Budgets Total	Committee Budgets total 0.4% of our total budget			\$ 1,400	\$ 1,400	\$ 1,400	0	0%	
181		Contingency/Slack	Unforeseen, emergencies, or slack on other items ...			\$ 1,927	\$ 3,107	\$ 3,500	393	13%	
182		Expenses Total				\$ 312,989	\$384,607	\$ 378,502	(6,104)	-2%	

[the end]

## Recent History of our Board of Trustees

[Those in blue are likely nominees and will be determined by this 2024 Annual Meeting.]

Trustee Term:	ends Jan 2015	ends Jan 2016	ends Jan 2017	ends Jan 2018	ends Jan 2019	ends Jan 2020	ends Jan 2021	ends Jan 2022	ends Jan 2023	ends Jan 2024	ends Jan 2025	ends Jan 2026	ends Jan 2027
1	Brian Lora	Lora			Kat			Kristina			Open	Deirdre Duffy	
2		Joy	Christine		Alison			Lydia	Lora			Jan Ellsworth	
3		Cynthia			Susan Richards			Susan Richards			Chris Hanson		
4		Joanna			#Nancy	Rob			Randi Allfather				
5			Val			Natalie			Kathy	Carol Benchley			
6			Clay		Open	Carl			Carl			Open	
7	Jim			Peter			Loretta			Barbara Elder			
8	Susan Richards			Michelle	*Joanne			Susan Berman			Suse Robinson		
9 Treasurer	Paul	Paul	Paul	Paul	Paul	Paul	Jeffrey/Kat	Paul	Paul	Paul	Paul		
Minister:	Rev. Linda Simmons										Rev. Dr. Althea Smith		
Pink:	Current voting Trustees												
Yellow:	open												
Blue:	to be elected at Annual Meeting??												
Gold:	Past Trustees												
* Appointed by Nominating Committee after Annual Meeting to fill term	2024 members of Board and NomCom												
# One year term to correct uneven balance of terms ending at same time.													
Nominating Committee:	Christine	Stephen	Lora	Val	Joanne	Randi	Jim	Jim	Jim	Jim	SusanR?		
	David	Jan	Janet	Suse	Anne	Anne	Anne	Anne	Anne	Anne	Anne?		
	SusanR	SusanR	Christine	John	Jim	Peter	Peter	Peter	Peter	Peter	Kat?		
Constitution:	Article 8 Nominating Committee	The nominating committee shall be elected at the annual meeting following nominations from the floor. It shall consist of three members who shall serve for one year and shall present to the annual meeting a list of nominees for all vacancies on the Board of Trustees, including individuals filling any unexpired term(s) that may exist. This shall not preclude nominations from the floor at the annual meeting. Any vacancy occurring on the Board of Trustees in the course of the year shall be filled through appointment by the nominating committee.					Constitution amended 1/22/2023 to allow a range of "six to nine elected Trustees" plus the Minister ex officio non-voting.						



<https://nha.org/pdfs/sanbornmaps/5Aug1909/NantucketAug1909Sheet9.pdf>

**Second Congregational Meeting House Society / Unitarian Universalist  
Agenda of the January 28, 2024, Annual Meeting**

1. Call to Order .....President Susan Richards
2. Opening blessing and words.....Rev. Althea Smith
3. Determine quorum of at least 22 voting Members..... Clerk Barbara Elder
4. Approve minutes of prior congregational meetings ..... Clerk Barbara Elder  
    1/30/2023 Annual Congregational Meeting  
    8/20/2023 Special Congregational Meeting
5. Constitutional Amendment..... Clerk Barbara Elder  
Our current Constitution includes in Article 5:

The Minister shall be a nonvoting, ex-officio member of the Board of Trustees and its committees, except for the Nominating and Ministerial Search Committees, and shall have the privileges of the floor at all meetings of those bodies, except for Executive sessions of the Board of Trustees.

The above language was adopted by us 22 years ago. The UUA now advises that the Minister **not** be excluded from the Nominating Committee, recommending that:

The unique role of the minister in advising the Nominating/Leadership Development Committee is acknowledged, as the minister is expected to have a breadth and depth of relationships and perspectives to help identify appropriate leaders for the Congregation.

- I MOVE we follow the recommendation of our Board of Trustees and our UUA to amend our Constitution by removing the phrase “Nominating and” from the above paragraph of Article 5. .... (two-thirds vote required)
6. 2023 Annual Budget..... Treasurer Paul Stewart  
I MOVE we follow the unanimous recommendations of our Finance Committee and Board of Trustees and approve the 2024 budget in column AO of the budget summary presented.
  7. Officers and Nominating Committee
    - a. Thank outgoing Trustees, Nominating Committee, and SCPF Directors
    - b. Elect Treasurer
    - c. Elect Trustees
    - d. Elect South Church Preservation Fund Directors
    - e. Elect 2024 Nominating Committee
  8. Questions and Answers
  9. Adjourn.....President Susan Richards

**Support document at [UnitarianChurchNantucket.org/congregational-documents](https://UnitarianChurchNantucket.org/congregational-documents)**

- 2023 Annual Report, which contains:  
    Minutes as listed above  
    Nominees  
    Recommended 2024 Annual Budget



Animal Blessing service, October 8, 2023

## Rev. Dr. Althea Smith

Minister of the Second Congregational Meeting House Society,  
Unitarian Universalist, Nantucket

Starting October 1, 2023