

Parish Committee Agenda
First Parish Unitarian Universalist of Arlington
September 21, 2021

Attending: Marie Meter, Celia Wcislo, Marta Flanagan, Sara Galantowicz, Rev. Erica Richmond, Steve McMullin, Anne Quaadgras, Tom Estabrook, Carolyn Hodges, Tina Schultz, Jeff Keffer, Al Tosti

Financial Report & dashboard (Carolyn)

- Net income remains positive through August 31.
- The pledges and plate income for the first two months are below the budgeted amount. Too early in the pledge cycle for concern. Carolyn and Shay are looking at these numbers in greater detail.
- Expenses overall have been below budget initially. Staff raises and the new sexton result in salaries expense in excess of the budget for the period.
- Most Treasurer transition actions are complete. Carolyn is still trying to get the First Parish credit card signatory changed over to the Treasurer and office manager.
- The RFPs for the audit went out to five firms, but only one responded. Carolyn will recommend to the working group to defer to next year to hire an audit firm when there are more applicants.

(Vote 1, Discussion). Consent agenda: Minutes, Financials, lead Minister's Report, Parish minister's report, and RE report are accepted and placed on file. Motion made by Sara and seconded by Jeff. Motion passed unanimously.

Updates and Votes

- Survey (Sara)- Sara reviewed the draft survey. Opening questions include demographics and health risks, followed by a question on vaccination status and factors respondents consider important in deciding to return to in-person services. The survey also presents a few different attendance policy scenarios for feedback. Parish Committee members discussed the draft and suggested edits for clarity. Sara will update the survey and include a "due back by" date.
- FP support for "[Rise Up about the Fair Share Amendment](#)" (Rev. Erica)
 - Rev. Erica presented a request from Social Justice that First Parish sign onto the "Rise Up" ballot campaign to tax millionaires in MA for revenue for transportation and education. Rise Up is a proposal to tax income over one million dollars at a 5% higher tax rate. This proposal was passed by a 140/30 vote in the Legislature.
 - Following a brief discussion it was decided to send this request back to Social Justice for a committee vote and to present to the Parish Committee again.
- Update on financial guidelines for reserves and surpluses (Carolyn)
 - A financial subcommittee made up of Carolyn, Sara, and Jeff, is recommending new financial guidance, which has been reviewed by Eric Segal, and Lissa McBurney from the Finance Committee.

- These recommendations are guidance on how Parish Committee should spend and allocate current and future surpluses.
- At least two months of operating reserves (about \$100,000) should be kept in an operating fund to help during future fiscally challenging times. The eventual goal would be to have three months in reserves, which First Parish can build up to over time.
- There is currently \$175,200 in our general contingency fund. This proposal would set aside \$100,000 of that in an operating reserve fund, and \$75,200 would be available for Parish needs at the Parish Committee's discretion.
- This proposal is consistent with Sections 2, 3 and 5 of the by-laws, and with the annual budgeting process. It would require no congregational meeting to expend the operating reserves.
- The guidance further clarified that the provision regarding the Parish Committee's ability to move up to 10% of budgeted funds without a congregational vote refers to 10% of the total budget and not 10% of a single line item.
- Vote 2: After a general discussion, a motion was made by Marie, seconded by Steve, to "accept the guidance of the financial subcommittee for use of our surpluses. Motion passed unanimously.
- Update on RE: Survey results, first Sunday of RE and plans for fall (Tina)
 - Good news on the RE survey results. Most of those who responded are comfortable with their children participating outside, and many would also be okay with them moving indoors later in the season.
 - RE is planning to continue outside through mid-October.
 - All adults involved in RE are vaccinated.
 - Fourteen children are in OWL (8th grade) this fall, we have had 100% retention of last spring's Coming of Age class into youth group, and thirty others are attending the high school youth group.
 - A total of 48 children have been signed in by their parents for Sunday morning programming. Average weekly attendance has been 26

Marta's Sabbatical

- Review plans-Marta is planning to take off four and ½ months for sabbatical from January 1 until mid-May.
- Mark Fredette, a retired minister from the Waltham Parish, has been interviewed and selected to provide support during Marta's sabbatical. A draft letter of agreement has been developed outlining Mark's role supporting Rev. Erica while Marta is away.
- The ministers are ready to start planning the transition with Mark, once the letter of agreement is approved.
- Vote 3 : Motion made by Jeff and seconded by Carolyn to accept the letter of agreement. Motion passed unanimously.

State of the church (Marta & Rev. Erica)

- First Parish is holding up well compared to other UU congregations. We have been averaging 130 members on Zoom services.
- RE has maintained a core program.
- Members are showing up for Star adult education programs.
- Lectio, Covenant groups and Spirit talks have been consistent.
- There is still anxiety over COVID and how we manage it.

Fair Marie will ask the Harvest Moon Fair committee what kind of event it would like to hold, and when.

Direction to Parish Committee members: Looking at the year ahead please think of:

- One policy (or policy topic) you would like to drill down on
- One topic for a subgroup to focus on
- One group that we should invite in for a deeper report into what they are doing

Pandemic Plans – Discussion postponed until a separate October 12th meeting.

- Use of the building
- Vaccination requirements?
- Fair
- Worship

Motion made to adjourn at 9:10 PM by Sara and seconded by Anne. Motion passed unanimously.

Attachments: August Minutes, Financial Documents, Ministers' reports, DRE report

MOTIONS

Vote 1: I move that we adopt the consent agenda.

Vote 2: I move to accept the surplus guidance as proposed by the financial subcommittee.

Vote 3: I move to accept the letter of agreement for the hiring of Mark Fredette during Marta Flanagan's sabbatical.

Lead Minister Report
August 15 – September 15, 2021
Rev. Marta Morris Flanagan
First Parish in Arlington Massachusetts

It has begun! This last weekend we kicked off the new program year with both Rev. Erica and I in the pulpit – actually standing in the pulpit in the sanctuary during online Sunday morning worship! The choir gathered outside to rehearse and record new pieces that will be used in the coming weeks. And programming dedicated to children begins this coming Sunday. Our STAR Adult Enrichment team is unrolling conversations in the courtyard to maximize incarnate opportunities to be together while the weather is still warm.

Of such special note this past Sunday was our OUT-Gathering organized by the Committee on Ministry on the Whittemore Lawn. About 130 attended wearing masks. Light refreshments were served. What a sense of joyous reunion! Much thanks to the many who made this warm reunion possible.

The past month included start up activities including a Staff Development Day on August 25, a Worship Associate Training on August 27 and 28, and a Lay Ministry Training that will occur this weekend, September 16. Also, the VIP-C Program Council resumes its programming for program committees this Sunday afternoon, September 19. The Membership Committee held a planning retreat and other committees are back into their usual monthly meetings.

Amidst these start up activities, our ministry of care to one another continues. With Rev. Erica, Tina and my return, pastoral contacts have increased along with ongoing rich work of our lay ministries. On September 1 we remembered Nancy McKersie, who died August 13, in a moving zoom online service. We have been living our mission of companionship one another through the changes in our lives.

The buzz about the congregation remains how to manage COVID in our personal lives and in the life of the congregation. We are all learning to live and trust that what is is only “for now.” Things change and we in turn will change, making new choices, and weighing competing goods with an idea to what is wise

I remain grateful to your faithful leadership and support through these unusual times.

Marta

What follows is a more detailed accounting of ministerial activities this month.

Summer Worship and Out-Gathering Sunday, September 12

The Worship Associates assembled an array of lay preachers. Average attendance for incarnate summer services had been 60 individuals in recent years. Last summer, the first summer of COVID 100 screens on average stayed on for at least 30 minutes. For the 12 lay led summer services (Fathers' Day through Labor Day) this year average attendance was 74 (the number of screens staying on 30 minutes or longer). A rough estimate of the number of people that we have been using through the year has been 1.25 screens.

September 12 Living the Questions: A Dialogue Sermon by the Ministers
174 (# online screens >30minues)
(perhaps 217 people)

Worship Associate training: Friday-Saturday 8/27 and 8/28
Worship Associate monthly meeting 9/8

Pastoral Care Provided by Lead Minister

Pastoral appointments and visits:

Online: 7

Office: 5

Home: 1

(themes: death/grief, spirituality, life transition, addiction)

Staff and Lay Leadership Support Provided by Lead Minister

Appointments with lay leaders regarding projects and committee work: 6

Committee meetings attended:

(in addition to Worship meetings and Adult Programming Committees):

ParCom Exec 8/23, 8/29, 9/1, 9/8

ParCom 8/17, 8/31

Committee on Ministry 9/15

OUT-Gathering Planning 8/26, 9/9

Weekly individual meetings with Parish Minister Rev. Erica and DRE Tina Schultz

Biweekly weekly meetings with Music Director Jonathan Brennand

Weekly Program Staff Meetings (Ministers, DRE, Office Manager, Music Director)

Adult Programming Activities of Lead minister

Lead Lectio Divina: twice a week (attendance 14-25)

I resumed facilitating lection Divina sessions on Wednesday morning (9a) and Thursday mornings (8am). Those days were lay led through the summer as are Tuesdays (7am) throughout the year.

Attend meeting of Covenant Group Convenors 9/1

Professional Development and Continuing Education of Lead Minister

Attended first session of an online training on Coaching, Lutheran Seminary, 9/4

Parish Minister Report

August 18 2021-September 21, 2021

Rev. Erica F Richmond

First Parish in Arlington Massachusetts

Well, happy September! There is a Green Day song (elder millennial alert) that says, "Wake me Up when September Ends," and normally I hum it through the month, but this year, I am relishing in this time. It is such a treat to start year 2 with you all. I know how to get in the building! I have an email address! I know your names! I am part of this vibrant and wonderful community! What a difference 12 months make. Things feel more spacious given I am starting this year with sense of familiarity. And what fun was Outgathering! I keep meeting people for the first time (in the flesh) which is wild but also such a source of joy!

And thank you for the leadership you all are providing, there is a lot of navigate but the non-anxious presence you have has led to great moments of community and connection for our congregation.

blessings,

rev. erica

Worship:

Marta and I did a dialogue sermon for the first Sunday for the 2021-2022 programmatic year. We explored Rilke's poem about living the questions and how we all might cope with the uncertainty before us: 1) listening to our body, 2) finding solace in nature and art, and 3) connecting with community.

Outgathering was a great success! So lovely to continue to meet new folks in the flesh! This coming month I am leading an outdoor Vespers service for the Autumnal Equinox on Wednesday, September 22nd at 7 pm in the Meeting House courtyard.

And preaching on Harriet the Spy on 9/26!

Pastoral Care Provided by Minister

I continue to provide spiritual care to individuals and families.

Individual pastoral care sessions: 4 (in my office!!)

Individual meetings with committee leaders: 3

Themes included ongoing illness, grief, and familial relationships.

Lay Ministry:

I am leading the annual training for returning and new lay ministers on Saturday, September 18th from 12-4. The installation of the new folks is slated for worship on Sunday, 9/19. I note that both the monthly grief group and retirement group are ongoing. LM also hosted a second LGBTQ gathering in the courtyard on 8/31, which I was able to attend.

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Staff and Lay Leadership Support Provided by Minister

The programmatic full-time staff team continues to meet weekly.

Staff Development Day: August 25

Committee meetings attended:

ParCom Exec: 8/23 and 9/8

Committee on Ministry: 9/15

Membership Committee: helped lead 5-hour retreat on 8/21, 9/19

Lay Ministry: 9/1, and retreat

Leadership Development Committee: 8/16

Racial Justice: 9/2 and 9/9 (two-session retreat)

Social Justice: 8/25

Stewardship: N/A

Adult Programming: Education, Spiritual Deepening, Community Building

I am planning on two adult education programs this fall:

1) Funny about Money, a personal spiritual exploration about finances and how we make sense of money in our lives, two Thursdays in October

2) Sexual Ethics, how we approach sexuality as UU's, two Thursdays in November

Social Justice / Turning Outward

- I also continue to organize with Boston Immigration Justice Accompaniment Network- I answered the hotline on Mondays during the month of September.
- I plan on attending the Free them All rally at Plymouth Detention Center later this month
- I continue to attend the meetings of the Arlington Police chief's advisory committee, 9/15
- FP Social Justice Committee is having a networking event of all social justice leaders on 10/9 to talk about coordinating agendas and plans for the year.
- I want to celebrate the Indigenous Justice Working Group- they have been building relationships with one another and led a FABULOUS summer service on August 29

Professional Development and Continuing Education

Attended women minister support group "Follen Women," 9/16

Started 7-week course on Coaching on 9/13

Continue monthly UUA mentor meeting as well.

Monthly session with my Spiritual Direction

DRE Report September 2021

If you build it, they will come.....

Hello Friends,

I am very happy to report that we have begun our fall program at First Parish and the kids (and parents) did come back! I am very grateful for Ellen Robie and the RE Committee's energy. Together we sent a welcoming greeting card, by U.S. post, to every child in our database, plus a few whose families have filled out newcomer cards.

Yesterday we offered a blessing of the backpacks and devices in the courtyard and approximately **40 children** from grades Prek- 7, and at least one parent per child joined us. The courtyard was packed.

Anne Goodwin shared multiple musical pieces. We did joys and sorrows with rocks, a body prayer, and a celebration of our devices and learning tools. Each child was given a small flashlight for their backpack/school bags to keep them safe, and to remind them of the light of the divine and holy in each of us.

Most importantly, we saw each other again, touched elbows, waved and greeted one another. Members of the RE Committee stepped up to help set up and break down. Families lingered and chatted after we shared the benediction. It was a joy to be together again.

Rose and the youth co-leaders met with the incoming freshmen for a youth group orientation yesterday at 3:30 pm, also in the courtyard. **9 or the 12** kids from Coming of Age showed up, and more have promised to be there next week. The whole group met at 4 pm and **30 teens** spent two hours playing icebreaker games, sharing stories of summer adventures, their hopes and dreams for the fall, and plans for upcoming youth group events. Advisors Paul Franzosa, Andrew Kobabayshi and Bill Licea Kane returned to lend their support. We are currently on the hunt for female advisors (suggestions accepted!)

We took plenty of photographs of both the morning program and Youth Group, which will be shared with the congregation in next Sunday's worship service.

OWL kicked off at 7 pm with a class of **13**. Most of these kids have been together since PreK. Teachers Leslie Lewis, Eric Segal and I held the parent orientation a few weeks back. **All the youth (and teachers) are vaccinated** and the parents are comfortable with the youth being in the Parlor, fully masked. I am so grateful this class can be taught in person.

What's Next?

We intend to stay outside as long as we can. However, if the weather turns cold/nasty we will gather in the Sanctuary, spaced apart with cushions for the children. Following a welcome/greeting, smaller groups will go off to various open spaces in the building for art projects or other activities. We will connect with families via email on Sunday mornings if we are NOT staying outside.

September 26:

Morning program meets in the Courtyard at 10:00. We will be making chalices and talking about altars. Small groups will forage in nearby areas for materials from nature for altar making. Children will talk about chalice lightings, blessings, and table graces. Familiar rituals will be continued. Anne Goodwin returns as a musical leader.

OWL meets at 7:00 pm in the Parlor

Youth Group meets at 7:00 pm either outdoors or in the Bailey Room or Sanctuary (weather dependent)

October 3:

Water is the theme of the day. We will have a water blessing and read a Native American story (Water Protectors). Small groups will walk to the Native American Statue behind the library or to Spy Pond (older kids). Older kids will pick up trash at Spy Pond.

October 2:

Youth Group Lock Out, 6-10:30 pm (not sleeping over this time), in the courtyard. Worship, music and bonding activities.

October 10:

A multi-aged, family walk at Whipple Hill, starting at 10:00 a.m. NO OWL or Youth Group. Older children and their families will be invited to the Matt Meyer Drumming Program.

Following these weeks we will reassess. We will have a better sense of what our returning population will be.

The RE Committee will be meeting bi-monthly to discuss our next steps. The Curriculum sub-committee will present two suggestions for when we meet again in the building - either to meet by grade, as we always have done, with our usual lessons; or, if our numbers are smaller, to divide by age groups and offer lessons from Soul Matters, a thematic curriculum we used last year. Of course we will make plans in case we need to meet virtually if COVID numbers rise.

I received a thank you email this morning from a dad with three small children, telling us how grateful his family was for the opportunity to connect, to see one another again, to pray, to smile, and to hang out with other parents while their kids ran around in the graveyard.

This is why we do the work we do.

Thank you all for your support and patience as we figure it all out, together.

See you Tuesday night!

Tina

First Parish Unitarian Universalist of Arlington
Recommended Bylaw Guidance- Financial Matters
September 2021

ARTICLE XII—Fiscal Matters

Section 1. The fiscal year of the Church shall be from July 1 to June 30.

Guidance (Sept 2021): No change.

Section 2. In its management of the affairs of the Church, the Parish Committee shall expend only such sums as have been appropriated by adoption of the annual budget or by special vote taken at the Annual Meeting or at another congregational meeting or are designated gifts or grants that are intended by the giver to be used before the following fiscal year.

Guidance (Sept 2021): "...such sums as have been appropriated by adoption of the annual budget.. indicates expenditures remain appropriated by budget adoption, including expenditures of budget surplus in a subsequent year. Budget surplus expenditures are subject to further recommended limits provided below.

Section 3. At each Annual Meeting, the Parish Committee shall submit an operating budget for the coming fiscal year. The budgeted expenditures may not exceed the anticipated income. A budget shall be adopted by a simple majority vote of the voting members present at the meeting. Once a budget is approved, the Parish Committee may authorize and expend the funds as budgeted; however, the Parish Committee may reallocate funds among the line items of the approved budget so long as the amount reallocated does not exceed ten percent of the total budgeted expenditures.

Guidance (Sept 2021): ... Parish Committee may reallocate funds among the line items of the approved budget as long as the amount reallocated does not exceed ten percent of the total budgeted expenditures... indicated expenditure allocation representing ten percent of the TOTAL budget.

Section 4. Each committee of the Church, whether standing or appointed, shall have the right and responsibility to direct expenditure of funds allocated for its use in the annual operating budget.

Guidance (Sept 2021): No change.

Section 5. The Parish Committee may borrow money for church expenses, if necessary; however, no borrowing of money nor financial contract may be made without approval of the members of the Church in a congregational meeting if such borrowing or contract involves more than ten percent of the current annual operating budget.

Guidance (Sept. 2021): No change.

Guidance regarding surplus:

The Parish Committee will have the ability to expend uncommitted prior year surplus, limited by retaining a recommended working capital reserve representing two months of the key fixed expenses namely budgeted salary (including employee benefits) and other

fixed expenses for property, utilities, and insurance. (For example, for FY 2021 Surplus contingency should remain within \$100.6 thousand, representing two months of budgeted fixed expenses for salary and building maintenance. As of July 1, the 2410-General Reserve Contingency Fund balance is \$175.8 thousand. In this example, \$100.6 thousand is retained to be used in the event of unforeseen circumstances adversely affecting Parish cash flow and the balance of \$75.2 thousand would be available to address other critical Parish needs at the discretion of the Parish Committee).

Additionally, we recommend that the Parish Committee set an aspirational goal to increase the working capital reserve using future surpluses to at least 3 months of key fixed expenses.

Aug-
21

	Current Month Actual	Current Month Budget	Variance	%var	YTD actual	YTD Budget	Variance (amt)	Variance (%)	Notes/ Drivers
Income									
Pledge	75,171	134,640	(59,469)	44.2%	187,508	204,210	(16,702)	-8.2%	Full year-pledges below plan
Plate	1,393	3,333	(1,940)	58.2%	2,825	6,667	(3,842)	-57.6%	plate income below plan
Fundraiser	0	125	(125)	100.0%	0	250	(250)	100.0%	
Tenant*	3,981	4,416	(435)	-9.8%	7,894	8,833	(939)	-10.6%	Mariposa-main tenant
Other Building	675	2,125	(1,450)	68.2%	1,125	4,250	(3,125)	-73.5%	other building use increasing
Contributions	8,965	8,667	299	3.4%	17,930	17,333	597	3.4%	Second Minister Fund and PPP loan
Total (sum)	90,186	153,306	(63,120)	41.2%	217,282	241,543	(24,261)	-10.0%	

										paid July 2021
	Total (sum)	68,965	76,205	7,241	9.5%	116,341	139,715	23,373	16.7%	
	All Expense	69,534	76,871	7,338	9.5%	131,177	164,420	33,243	20.2%	Key driver-favorable benefits, property, general exp & committees expense
	% explained	99.2%	99.1%			88.7%	85.0%			
	net position			-55,565		87,340	78,923	8,417		
			ck	-55,565				8,417		

Short-Term Adjunct Sabbatical Minister Letter of Agreement

August 19, 2021

Dear Rev. Marc Fredette,

The Parish Committee and Revs. Marta Flanagan and Erica Richmond enthusiastically invite you to join into this Letter of Agreement as our short-term Adjunct Sabbatical Minister. The period of service runs from January 1, 2022 to Tuesday, May 17, 2022. This part-time position serves our congregation during our Lead Minister Rev. Marta Flanagan's sabbatical. Our Parish Minister, Rev. Erica Richmond, will serve as acting head of staff during this time.

Pulpit and Worship Services

The Adjunct Sabbatical Minister will preach at five Sunday services –and be a presence and participant (providing the prayer or opening words) at all other worship services, with one Sunday off a month.

Services to Persons

The Adjunct Minister will serve members in their needs for pastoral care, either based on a congregant's request, at the request of the Lay Ministry committee, or at the direction of the Parish Minister.

The Adjunct Minister will provide ceremonial services, rites of passage, and counsel to members of the Congregation without fee or honorarium. All of this will be done in consultation with the Parish Minister.

Services to the Parish Committee

Along with the Parish Minister the Adjunct Minister will serve in an advisory capacity to the Parish Committee and Executive Committee. The Adjunct Minister will report to the Parish Committee at its regular meetings to address any specific concerns as they arise. Outside observations of our congregation are welcomed.

Lay Ministry, Adult Programming, and Community Building

The Adjunct Minister will oversee, guide, and support the Lay Ministry program, including advising and supporting Lay Ministers and regularly attending Lay Ministry meetings. The Adjunct Minister will provide adult education opportunities: 6-8 sessions, curriculum and structure to be determined in conversation with the Parish Minister. During this period of service the Adjunct Minister will launch and support a circle supper program- home potlucks centered on community building with monthly meetings to support facilitators.

Relationship to First Parish Staff

The Parish Minister will serve as the acting Head of Staff with responsibility for oversight of the work of the Director of Religious Education, the Music Director, and the Office Manager. It is expected that the Adjunct Minister will form collaborative relationships with all First Parish staff during this period of service. The Adjunct Minister will meet with the Parish Minister weekly and attend all staff meetings.

Office Hours, Days Off and Holidays

The Adjunct Minister will work on average 20-25 hours a week.

The Adjunct Minister will be present at the Meeting House at least 2 half days a week in addition to Sunday

Holidays are the same for the Adjunct Minister as other staff as is stated in the personnel handbook.

Sick and Family Leave

Paid sick leave of two days is available for use as needed for illness. In the case of an acute personal emergency, and in consultation and agreement with the Parish Minister, the Adjunct Minister may take a total of one week paid time off for that purpose.

Sabbatical Minister and Congregation's Conduct

The conduct of the Adjunct Sabbatical Minister and the Congregation of First Parish will be in accordance with the Code of Professional Practice and Guidelines for the Conduct of the Ministry of the Unitarian Universalist Sabbatical Ministers Association.

Compensation, Benefits and Professional Expenses

The Parish Committee will provide the Adjunct Minister \$23,000 for this period of service, this can be provided on a biweekly basis as is the practice for all FP staff. The total compensation will not exceed \$23,000; the breakdown between salary, professional expenses, and benefits is still to be determined.

Intellectual Property

All notes, research, sermons, and other materials authored by the Adjunct Minister will be the property of the Adjunct Minister.

Termination

The term of this agreement will continue until (a) the end of Tuesday, May 17, 2022, , (b) the Adjunct Minister provide the Congregation with at least fourteen days notice of intent to resign or retire, (c) the Congregation provides the Adjunct Minister with at least fourteen days

notice of intent to dismiss (assuming a departure without cause), or (d) the beginning of long-term disability or the death of the Adjunct Minister.

In the event of dismissal requiring at least fourteen days notice, salary will continue for one month from the date of dismissal.

The Adjunct Minister may be dismissed with less than fourteen days' notice, and without the severance payments described herein if the Sabbatical Minister:

- is convicted of a felony,
- has his Ministerial fellowship with the UUA terminated or suspended,
- is found by the Parish Committee to have engaged in emotionally, physically or sexually harassing or abusive acts toward a member of the Congregation, a Congregation employee, or a child, or is found by the Parish Committee to have grossly neglected his/her Ministerial responsibilities under this agreement and/or to have engaged in activities that bring the Congregation and/or Unitarian Universalism into disrepute in the community.

Date Agreement Approved:

For the Parish Committee:

_____ Chair

_____ Vice-Chair

Date Agreement Accepted: _____

By: _____ Sabbatical Minister

Invest in Our Recovery, Invest in Our Future

It's Time for Million-Dollar Earners to Pay Their Fair Share!

To help working families, to ensure Massachusetts stays a great place to live, work, and raise a family, and to build a stronger economy for us all, we need to make sure we have **high-quality public schools and colleges and a transportation system that works**. Without investments in these common goals, working families fall behind and our communities suffer.

Even before the COVID-19 pandemic, Massachusetts' economy was working great for those at the top, but that prosperity wasn't reaching most of our people and communities. Our transportation infrastructure was falling apart. Our public colleges were underfunded and increasingly unaffordable, and our public education system wasn't providing equal opportunity to all students. For years, Massachusetts' communities of color have been harmed by inequitable and inadequate access to transportation and public education. Now, **the pandemic has heightened these economic and racial inequities that prevent broadly shared prosperity**.

As we recover from the pandemic and in the future, **new revenue is necessary** to improve our public schools and pre-K programs; rebuild crumbling roads, bridges, sidewalks, and bike paths; make high-quality public higher education affordable; and invest in fast and reliable public transportation. Long before the pandemic, we needed new investments in our transportation and public education systems, and **now those investments are needed more than ever** to lift our economy into an equitable recovery and tackle the longstanding racial inequities that hold our state back from its full potential.

About Raise Up Massachusetts

Raise Up Massachusetts is a coalition of community organizations, faith-based groups, and labor unions committed to building an economy that invests in families, gives everyone the opportunity to succeed, and creates broadly shared prosperity. Since our coalition came together in 2013, we have nearly doubled wages for hundreds of thousands of working people by winning two increases in the state's minimum wage, won best-in-the-nation earned sick time and paid family and medical leave benefits for workers and their families, led the campaign for the Fair Share Amendment to invest in

transportation and public education, and started to build an economy that works for all of us, not just those at the top.



About the Fair Share Amendment

It's time for million-dollar earners to pay their fair share to support our economic recovery and the public services we all depend on. That's the best – and most popular – way to raise substantial new revenue for investments in transportation and public education.

For years, the highest-income households in Massachusetts – those in the top 1 percent – have paid a smaller share of their income in state and local taxes than any other income group. They've also benefited from repeated federal tax cuts: 83 percent of the 2017 tax bill's benefits [went to](#) the top 1 percent, and in 2020, the federal CARES Act [included](#) \$135 billion in tax breaks for wealthy business owners. **And while countless people and small businesses suffered during the COVID-19 crisis, wealthy executives and investors saw their incomes skyrocket.** The 19 billionaires in Massachusetts saw their wealth [increase](#) by a total of \$17 billion during the first three months of the COVID-19 pandemic alone.

The Fair Share Amendment is a proposal to amend the Massachusetts Constitution, creating an **additional tax of four percentage points on the portion of a person's annual income above \$1 million.** The new revenue, approximately \$2 billion a year, would be spent on **"quality public education and affordable public colleges and universities, and for the repair and maintenance of roads, bridges and public transportation."** To ensure that the amendment continues to apply only to the highest income taxpayers, who have the ability to pay more, the \$1 million threshold would be adjusted each year to reflect cost-of-living increases.

In June 2021, with a vote of 159 in favor to 41 opposed, the Legislature's Constitutional Convention voted to place the Fair Share Amendment on the November 2022 statewide ballot, where it is now set to be decided on by the

voters. Independent [polling](#) conducted by MassINC in December 2020 found that 72 percent of MA voters support the Fair Share Amendment.

Our wealthiest residents can clearly afford to pay a little more to fund the investments we all need. It's time to pass the Fair Share Amendment and invest in our future!

Take action and get involved: raiseupma.org