



# The Fellowship

a Unitarian Universalist congregation



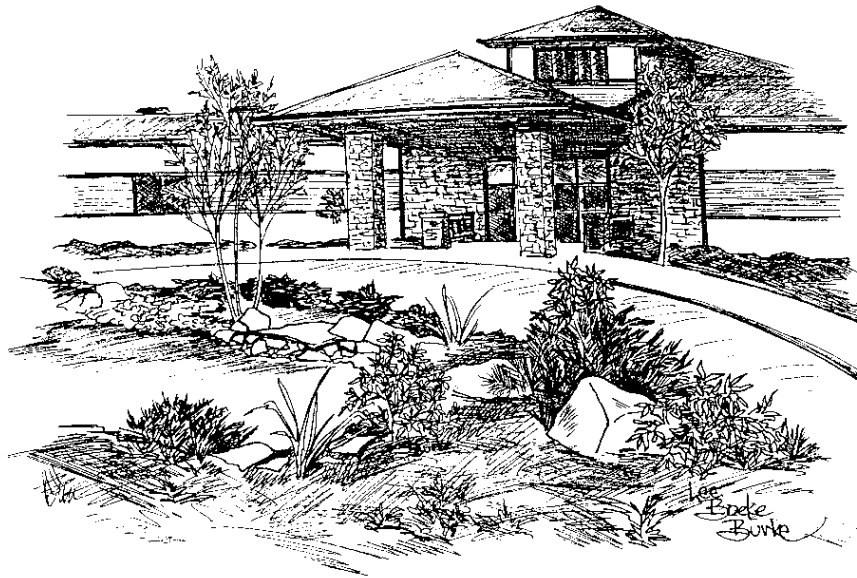
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## **ANNUAL REPORT**

### **2017-2018**

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Fiscal Year July 1, 2017 – June 30, 2018



**Fox Valley Unitarian Universalist Fellowship, Inc.**  
**2600 E. Philip Lane**  
**Appleton, WI 54915**

*Presented at the Annual Congregational Meeting – June 3, 2018*

# Fox Valley Unitarian Universalist Fellowship

## Annual Report 2017-2018

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### STAFF:

<i>Senior Minister</i>	The Rev. Christina Leone-Tracy
<i>Associate Minister</i>	The Rev. Leah Hart-Landsberg
<i>Director of Religious Education</i>	Kim Hartman
<i>Music Director</i>	Jay Thomas
<i>Congregational Life Coordinator</i>	Marie Luna
<i>Business Administrator</i>	Phyllis L. Schmitt
<i>Religious Education Assistant</i>	Eve Rosera
<i>Secretary</i>	Cyndi Polakowski
<i>Pianists</i>	Mayan Essak and Craig Jordan
<i>Childcare Providers</i>	Sophie Lewis, Lillie Chudacoff, Tina Metzner, Charisse Sylvester
<i>Audio Visual Technician</i>	Adam Robinson

### GOVERNING BOARD:

#### OFFICERS

<i>President</i>	Samantha Zinth
<i>Vice President</i>	Bradley Shipps
<i>Treasurer</i>	Theresa Hannah
<i>Secretary</i>	Chilwin Tanamal
<i>Members-At-Large</i>	Eric Riggers, Elizabeth Van Sickle, Dan Fischer, Terry Dawson, Andy Smock

### COMMITTEE CHAIRS:

<i>Art</i>	Gail Dolan/Mary Gerlach
<i>Audit</i>	Liz Prior
<i>Healthy Congregation</i>	Mark Marnocha
<i>Hospitality</i>	Beth Wilde
<i>Landscape</i>	Dave Roisum
<i>Leadership Development</i>	Brian Piasecki
<i>Neighbor to Neighbor</i>	Marge Koepke, Julie Thiel
<i>Personnel</i>	Marti Wheeler
<i>Planned Giving</i>	Tim Watson
<i>Public Relations &amp; Communication</i>	Open
<i>Services</i>	Morris Tirimacco
<i>Social Justice</i>	Core Team
<i>Wellspring</i>	Open

### FELLOWSHIP INFORMATION:

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2600 E. Philip Lane  
Appleton, WI 54915

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# Governing Board Report to the Congregation

## June 2018 Annual Meeting

In April 2017, the Fellowship convened a meeting of all past-presidents of the Governing Board. This was one of many gatherings for Rev. Christina's call week, which (as we know!) concluded in the Fellowship formally voting to call her as our second-ever settled Senior Minister.

At this meeting, some two dozen current, former and future presidents gathered to discuss the life and evolution of the Fellowship. We were asked a simple question: What memorable moment happened during your tenure? We started in reverse chronological order, hearing from every leader through present day. When it got to my turn (as the incoming president), I turned to Rev. Christina and said, "I have a feeling you will be my most memorable moment!"

We welcomed Rev. Christina to Appleton in August 2017 and hit the ground running with a half-day, start-up retreat for the Governing Board. We drafted a covenant, reviewed our policy governance framework, and set our goals and priorities for the year ahead.

A few months later, we held our second retreat of the year—a full-day session facilitated by Laura Park of Unity Consulting. This retreat focused on developing the Fellowship's ends statements, as part of our five-year planning cycle.

Our ends statements are born out of our mission and vision. Last year, Fellowship members voted to re-affirm our existing mission statement of *Welcoming, Growing, Leading*, while approving a new vision to provide deeper clarity on who we are and what we hope to achieve as an institution. The ends take that work one step further, defining not only our hopes and dreams, but our goals for actual, tangible community transformation. The Governing Board is pleased to share the new ends statements, which will guide the work of the Fellowship through 2023:

Rooted in our Unitarian Universalist identity, the people of the Fellowship embrace our collective responsibility to live our values within and beyond our walls. Across the lifespan, we:

- Love each other in times of joy, sorrow, and transition
- Live a life of purpose, rooted in spiritual practice, service, and wonder
- Create a culture of radical hospitality and compassion
- Form deep and authentic relationships across differences
- Are a visible presence and resource, courageously challenging injustice and inequity
- Work to end discrimination and systemic racism within ourselves, our congregation, and the world around us
- Generously share our time, talent, and treasure, in a spirit of joy and abundance

As your President, I was honored to lead the congregation in the Act of Installation for Rev. Christina's Installation Service on November 18, 2017. Hearing our beloved community pledge to journey together as we face the promises and challenges of the future, has been one of the most powerful experiences of my tenure.

As noted in the bylaws, three committees report directly to the Governing Board, and I would be remiss if I did not acknowledge their hard work and dedication this program year. This includes the capable leadership of the chairs: *Brian Piasecki* (Leadership Development), *Tim Watson* (Planned Giving) and *Liz Prior* (Audit). Thank you all for your service.

Finally, on behalf of the Governing Board, I would like to express my sincere appreciation to our talented staff. Rev. Christina, Rev. Leah, Phyllis, Cyndi, Kim, Eve, Marie, Jay and Adam—thank you for all that you do—whether it’s behind the scenes or from the pulpit, you each demonstrate professional excellence and an unwavering commitment in pursuit of our mission to *Welcome, Grow and Lead*.

*Respectfully Submitted,*  
***Samantha Zintz***  
*Board President*

# Treasurer's Report to the Congregation

## June 2018 Annual Meeting

If you are reading this it is likely because you are interested in the financial life of our congregation. If so, you may already be aware that each weekly scroll includes a link near the end that will take you to a summary of our monthly income statement. As with all financial reports, it takes some time to gather and review all of the information needed after the end of the month. Fellowship procedure is that these statements are reviewed at the Governing Board meeting on the third Tuesday of each month before they are posted. That means, of course, that it will always be late in the month before last month's financial statements are available, but it's a great way to stay up to date on how we're doing.

As treasurer I have worked closely with our Administrator, Phyllis Schmitt. Her willingness to answer any and all questions, and to help improve procedures, is always impressive and much appreciated. In addition to her other duties this year, Phyllis worked with our bank to move our savings to a different type of account to more than double the interest rate and she arranged for our checking account to earn a small amount of interest as well. Phyllis is also working to review contracts from various vendors to ensure our costs are in-line.

Your audit committee worked this year to verify that approvals and documentation are happening as required by the Fellowship's financial procedures. This group also reviews each monthly bank statement in detail to ensure activity is posted to our financial statements properly. Due to the very small size of our staff, segregating duties for good internal control is difficult. The staff does a good job of reviewing all activity and the audit committee helps insure confidence in our financial reports.

Thanks go to the members of this year's Planned Giving Team, most of whom were new to the work. They blended their talents well and did an awesome job of organizing the Acorn Recognition event in May. In the coming year we have an offer of matching funds for new pledges of legacy gifts to our Endowment. You will be hearing a lot more about that soon!

I am very excited about Rev. Christina's work to gather a group of financial folks this summer to discuss the idea of forming a "Generosity Ministries" team. I'm truly looking forward to that conversation.

My thanks to Phyllis Schmitt, our staff and to all the volunteers who work behind the scenes supporting our financial health. Of course, my biggest thanks go to all of you for your ongoing financial support.

*Respectfully Submitted,*  
***Theresa Hannah***  
*Treasurer*

# Executive Team's Report to the Congregation

## June 2018 Annual Meeting

Membership and attendance numbers for this year and the three previous years are:

### MEMBERSHIP NUMBERS

May 2015: 698 adults (net increase in adult membership of 9 or 1%)  
May 2016: 704 adults (net increase in adult membership of 6 or <1%)  
May 2017: 709 adults (net increase in adult membership of 5 or <1%)  
May 2018: 605 adults (net decrease in adult membership of 104 or 15%)\*

\*Decrease in membership as of May 2018 was the result of membership clean up in 2018. Membership clean up had not been done during senior minister transition.

### ATTENDANCE NUMBERS\*\*

2014-2015: Average total attendance of 405 per weekend (7% increase)  
average adults per weekend 336  
average children & youth per weekend 69  
2015-2016: Average total attendance of 360 per weekend (11% decrease)  
average adults per weekend 291  
average children & youth per weekend 69

**Note: beginning in September 2016, the Fellowship went to two services instead of three. The following figures are now not for “weekend” services but for two services on Sunday.**

2016-2017: Average total attendance of 387 per Sunday (8% increase)  
average adults per Sunday 318  
average children & youth per Sunday 69  
2017-2018: Average total attendance of 358 per Sunday (7% decrease)  
average adults per Sunday 299  
average children & youth per Sunday 59

\*\*Attendance numbers are for September through May - the numbers do not include summer services, Mingling of the Waters service or Christmas Eve services which are outliers)

### Introduction

In August, the Executive Team (often referred to as the X-Team or XT), which is charged with the day-to-day operations of the Fellowship, welcomed incoming senior minister Rev. Christina Leone-Tracy. She joined associate minister Rev. Leah Hart-Landsberg and business administrator Phyllis Schmitt. We engaged the services of the Rev. Dr. Mark Sundby from Leaderwise Consulting to support us in establishing healthy communication practices and helpful

shared understandings. This allowed us to begin our collective working relationship with respect, curiosity, and a context for further growth as together we look forward to serving the mission of the Fellowship.

Even as we dove into the work of the daily running the Fellowship, we have spent much of this year collecting, reviewing, and strengthening operational policies and procedures from the global perspectives of what we need now and what we will need in the future as we grow. This was a project identified during the transition, and while it's a long term, ongoing task not likely to have any official completion date, it has received significant X-Team attention this year. Some policies and procedures impacted include money handling, peanut safety, staff grievance, ministers' discretionary fund, and safer congregation.

The XT works closely with, and reports directly to, the Governing Board of the Fellowship. We are so grateful to have a good working relationship with a healthy board. We particularly want to thank new president *Sam Zinth*, as well as outgoing board members *Eric Riggers*, *Elizabeth Van Sickle*, and *Andy Smock*. Thank you! In addition, the X-Team works with the LDC to guide our leadership efforts. Outgoing chair *Brian Piasacki* has been instrumental in helping expand and tighten our leadership class, and incorporate a counter oppressive analysis in how leadership happens at the Fellowship. We are grateful.

**X-Team Reporting on the Board's Ends Statements.** This X-Team report will offer a brief summary of our review of how the Governing Board's ends statements have been addressed this year, followed by a longer description of the three main areas of oversight by the X-Team: Staff & Administrator, Building & Grounds, Stewardship/Finances/Budget.

***#1: People of northeast Wisconsin seeking a liberal religious spiritual home will find the Fellowship a loving and caring community that will joyfully accept and include them.*** Our congregation has seen a lot of change over the past few years and this year was no different with the arrival of a new senior minister. We have strived to reconnect with people who drifted away from the Fellowship during the interim, to let folks know about the upcoming 2018-19 Connection Saturday program for those who connected best on Saturdays, and Marie Luna, congregational life coordinator, has worked with her engagement team to keep people connected and engaged here at the Fellowship. Additionally, Rev. Leah has worked tirelessly with the pastoral care team to offer quality pastoral care for those struggling with loss or difficult times in their life. Read more about these efforts in the Associate Minister's report.

***#2: Seekers of all ages will find a nurturing and liberating environment that will feed the spirit and challenge the mind.***

Religious Education programs continued going strong this year, including 6 children and youth groups offered at each service hour, from preschool through high school. There were 198 children and youth enrolled in Sunday RE programs this year, with an average child and youth attendance of 84 per Sunday. The RE programs this year had a total of 54 adult volunteers. This is impressive, but it isn't nearly enough for our program size and scope. In order to be successful next year and not overburden any individual volunteers, we need a volunteer crew of 66 Sunday morning volunteers, plus 9 volunteers for Wednesday youth programs and a large cadre of COA mentors! Sign up with Kim Hartman at [kim@fvuuf.org](mailto:kim@fvuuf.org) if you want to volunteer. Eve Rosera was



able to continue in her newly-formed position as RE Assistant to Director of RE Kim Hartman. The 2018-19 budget allows for increased hourly pay and hours for Eve. One program that began this year and is still starting to take shape is the Multigenerational Ministry team, which includes *Theresa Spoehr, Liam Spoehr, Nick Schiller, Peter Sieck, and Karen Bachhuber*, which includes people of a wide range of ages represented on the team. The goal of this team is to curate and offer programs that would appeal to a wide range of ages at the Fellowship, not only kids or families with kids, in the hopes of increasing our connections with one another.

**#3: “Youth (ages 12-17) and young adults (ages 18-35) will discover lasting ways to connect to The Fellowship and the greater Unitarian Universalist community.”** There were 10 youth enrolled in OWLS, 7 in COA: UU Identity (see more below) and 12 in youth group. The Breakfast Club for youth provided a space for the Fellowship High School Youth to build relationships over breakfast and conversations. This year the Fellowship’s Coming of Age: Mentorship program (our traditional COA) took a hiatus and was supplemented with a program for 9<sup>th</sup> graders called COA: UU Identity, focusing on a different aspect of coming of age— understanding faith identity as Unitarian Universalists, led by *David Dodd* and *Alan Bruce*, with many guest presenters. Next program year, COA: Mentorship will resume under the full guidance of Kim Hartman, our Director of Religious Education. COA: UU Identity will also continue. This year, some of our youth leaders participated in the stewardship campaign, the installation, and on the newly formed Multigenerational Ministry team. The Lawrence University Unitarian Universalists (LUUU) kicked off the year with a booth at the Lawrence community fair with student and Fellowship member *John Newhall*, Marie Luna, and Rev. Christina. John has continued leading the group on a weekly basis, with several Lawrence UUs in attendance. The group is planning a trip in the fall to Lawrence’s Bjorklunden campus.

**#4: “Members and friends of the Fellowship will be a bold voice for those suffering injustice and will advocate public policies that value the worth and dignity of all, and will expand our hearts and hands to those in need in our community and beyond.”** Work on anti-racism, meeting essential needs of people in our community struggling with financial hardship, and connecting with our immigrant community to meet the needs of undocumented folks has been our primary focus. Find more detail about all of our social justice efforts in the Senior Minister’s report, since Social Justice falls under her portfolio. One important area of social justice to focus on in this report, however, is the Social Justice Core Team, and changes being made to our Action Team model:

**The Social Justice Core Team** is chaired by *Penny Robinson* and meets monthly to review the work of all the action teams, to inform the congregation about opportunities to “lead in social justice” and to encourage greater participation from the entire Fellowship in justice efforts. This year the team undertook a huge effort to review our existing organizational model for justice efforts (the Action Team model) and determined that the time has come to let that model go. For several months they met with Rev. Christina, opening up their meetings to anyone who wanted to attend, and attracting some new members to the team. The decision has been made that at this June’s annual meeting we will not be asking action teams to apply and be voted on by the congregation. A replacement model is not entirely finished, but communication about the new model will be forthcoming as it is adopted. The new name for the Core Team is not yet decided, but for now we are tentatively calling it the Coordination Team.

Some elements of the new model will include:

- Groups that focus on justice issues (formerly Action Teams) will be called Justice Action Ministries (JAMs, like the Essentials JAM or the Anti-Racism JAM), and the group that supports and coordinates all the groups and efforts (formerly the Core Team) will be called the JAM facilitators.
- JAMs can emerge at any time of the year, and disband when interest wanes. An application will be available for groups to apply to the JAM facilitators to be recognized as official Fellowship JAM.
- JAMs can form if they meet certain criteria (for example, at least three people committed, at least one being a Fellowship member, goals, alignment with our principles, etc.).
- JAMs will be encouraged and supported to employ a range of justice-making strategies, including direct service, education, witness, community organizing, and advocacy.
- The JAM facilitators will be the “hub” of all justice efforts, offering mentorship and connection to each JAM, providing coordination of their efforts, and improving communication about ways to live out our mission of leading in social justice both within and beyond our walls.
- The JAM facilitators can include people who serve on any of the JAMs, but can also include other members who just want to support general justice efforts at the Fellowship. Certain roles on the JAM facilitators will be static (eg, chair, secretary, treasurer, communications person, new JAM coach, etc.), but otherwise the facilitators will be open to anyone attending meetings which will happen monthly (4:30-6pm on the 3<sup>rd</sup> Thursday of each month).
- Instead of offering each justice group their own special collections, the JAM facilitators will have a few collections each program year to raise money generally for justice efforts at the Fellowship. They will then disburse funds to JAMs as need arises and is requested.

Some members of the team also participated in the still-in-formation group of Wisconsin UU’s for Social Justice, including *Penny Robinson, Doug Marsh, and Rev. Jim Coakley*. The hope is that Wisconsin UU’s could create an organization similar to Minnesota UU Social Justice Alliance.

**#5: “We are generous and creative people dedicated to supporting the staff, programming and infrastructure that make our shared dreams a reality.”** The X-Team has been mindful of the often under-resourced staff. The stewardship campaign this year focused on this reality and we are pleased that many people kept their pledge steady and many even increased their pledge to allow us to improve compensation for staff and to have enough staff to run the Fellowship smoothly. Pending approval of the budget for the upcoming year, Marie will be promoted from congregational life coordinator to congregational life director, a long awaited move which will both recognize the quality and quantity of work she’s been doing as well as expand her position’s impact and oversight in the congregation. Last year we were able to hire Adam Robinson as our audiovisual technician out of year end excess funds; this year we have written this position into our operation budget.

**#6: “We will strengthen our Oshkosh satellite and collaborate with our neighboring and partner UU congregations to make UU stronger and more vibrant.”** This year the Oshkosh

satellite program continued with the leadership of *Mel Hunt* and *Kami Zuercher*, and the program coordination of *David Hegedus*. They explored various world religions this year, inviting guests from various religious communities in the Oshkosh area to come speak with them, and they learned more about their neighbors in this way. Read more about the Oshkosh satellite in the Senior Minister's report.

Now, we turn our attention to the areas of operation that the X-Team oversees:

### **Staff & Administration**

The Fellowship has been fortunate to have a staff that not only cares deeply about their work, but they also care for one another. There is a sense of affection and mutual respect and support for one another. There is much laughter and joy at staff meetings, which makes for an excellent working environment.

Outgoing music director *Jay Thomas* is winding down a long and successful music ministry here and we each personally thank him for his dedication and spirit. We look forward to welcoming incoming director *Dr. Steven Sieck*, an accomplished and enthusiastic music professional who brings with him a host of experience, including in congregational music.

We are pleased to report that the *Rev. Jim Coakley* will be serving as the temporary part time assistant sabbatical minister during the associate minister sabbatical. Rev. Jim will oversee pastoral care, and will support the new Justice Connection Saturday program beginning in the fall. The staff and lay leadership have worked to ensure that all areas of the associate minister portfolio will be adequately covered.

A special thanks to member *Debi Plachinski* who volunteered consistently in our office during the week.

### **Policy work**

Rev. Christina, Kim Hartman, and the Healthy Congregation Team worked to adapt a very comprehensive document of **safety policies and procedures** which Rev. Christina had created in her previous ministry. The document was reviewed and approved by the staff and board, to be implemented in the new fiscal year.

Staff-related policies, including a **grievance procedure** for how staff members handle grievances with each other, particularly when a grievance is with their supervisor and/or between members of the X-Team. Also, an updated and standardized policy and procedure was created for staff evaluation involving seeking feedback from targeted Fellowship members, and two-way communication between the staff member and their supervisor.

The XT updated our **money handling procedure** to improve secure handling of cash at the Fellowship, particularly during or after service offering collections. This also included the purchase and installation of a new safe with a drop-slot, making the depositing of cash to the safe simpler and safer.

The Fellowship now has a **peanut safety policy**, designating the majority of common spaces at the Fellowship building peanut-free. We ask that people not bring food with peanuts or peanut-products into these spaces to keep people, particularly children, with severe peanut allergies safe. We recognize that there are numerous other allergies, but peanuts are a common severe allergy among children and we have families in our community who are affected by this allergy and we are striving to keep them safer, and provide a more welcoming atmosphere for them.

## Stewardship and Finances

We are grateful to the very hard-working members of the Stewardship Team who are tasked with raising the funds to keep the Fellowship operating. Particularly, we want to thank two outgoing members of the team who have served each for over a decade, *Marti Wheeler and Karen Iverson Riggers*. The team also included *Shannon Kenevan, Dave Sebor, and Debbie Harrison*. This year the team built on the success of last year, doing some data analysis of our Fellowship's giving capacity based on the senior minister search survey, which gave good information but awareness that better data is needed. They began the Ambassador program which met with small groups to discuss connection to the Fellowship and stewardship. They hosted 9 house parties throughout the valley at members' homes to encourage conversation and information about the stewardship program. Thank you stewardship team!

As of this writing we have officially wrapped up our campaign, and though we may see more pledges trickle in we have moved forward with our proposed budget based on the pledges that we have received as of 5/16/2018.

The results of this year's stewardship campaign were:

170 pledges increased from 2017-2018	total \$380,935, increase of \$78,615
106 pledges did not change from 2017-2018	total \$232,863
48 pledges decreased from 2017-2018	total \$63,148, decrease of \$45,278
34 pledges from 2017-2018 were not received	total decrease of \$81,598

In summary, total pledges received decreased by \$48,261 over 2017-2018. Though we were not able to fund every item increase sought at the beginning of the 2018-2019 stewardship campaign there are many positive things to highlight, and celebrate! Our proposed 2018-2019 budget incorporates additional revenue from a new fundraising opportunity (see details below), and additional unpledged revenue for current EFT contributors that have not turned in a pledge form for 2018-2019. Highlights include the following:

- Keep all staff within the UUA's fair compensation guidelines for salary and benefits.
- Increased hours and pay rate for the RE assistant position that only began in 2016-17.
- We are able to sustain the audio visual technician position that was funded in 2017-2018 from the prior year's excess, and add the position as a budget line item.
- Increased pay for the secretary, Cyndi Polakowski, according to her tenure and skill.
- Role promotion from Coordinator to Director of Congregational Life to Marie Luna, commensurate with her tenure and skill, with associated salary increase.
- Addition of a part-time (.25) building maintenance technician position.

- Continue to budget both UUA and Midwest Region dues at fair share.

**Fundraiser:**

We have built into the 2018-19 budget a fundraiser which we expect to raise at least \$30,000. The idea is a raffle, in which tickets will be sold by anyone in the Fellowship to others (in or outside of the Fellowship) for \$20 apiece. The winner of the raffle will win dinner for two, anywhere in the world! The prize will have a set value under \$10,000 (to be determined, along with other logistical details). If 100 people each sold 20 tickets, or 200 people each sold 10 (or some combination), and the prize was valued at \$10,000, we would net \$30,000. The stewardship team and the governing board feel confident we can sell that many tickets among the 600+ members and friends of the Fellowship, and hopefully more! We will need help to make this raffle a success. Please contact Rev. Christina if you are interested in helping.

Thank you to the Stewardship team for helping us remember that “Justice Starts Here.” With firm grounding with solid staff, we can continue to move outward in our Fellowship and our wider community!

**Conclusion**

What a year it’s been! We are so grateful to have concluded the program year with our new settled X-Team intact. We look forward to working together into the future! Rev. Leah Hart-Landsberg will be on sabbatical from July 1 to December 23, and our X-Team will function with the two remaining members, calling on Governing Board leadership as needed. We feel confident that the smooth running of the Fellowship will continue under this configuration.

It has been our privilege to serve you this year.

*Respectfully submitted,  
Reverend Christina Leone-Tracy, Senior Minister  
Reverend Leah Hart-Landsberg, Associate Minister  
Phyllis L. Schmitt, Business Administrator*

# Senior Minister's Report to the Congregation

## June 2018 Annual Meeting

### Introduction

What a year it's been! It's been a year of transition for us both; as you (the Fellowship) welcomed me as your new Senior Minister and I transitioned into this new role after serving as a Faith Development Minister, and moving with my family to the Fox Valley.

I knew that this first year would be a whirlwind, and I was right! I've spent the year with my fingers in all the pies, so to speak, learning the workings of almost every committee and group so that I could have a better grasp of how things work here and where my time and energy should be dedicated. In the future, I will not be attending everything, but will try to focus on a few things each year where my effort will make a positive difference. Next program year I am excited about our Connection theme which will focus almost every aspect of Fellowship life on what it means to be a Unitarian Universalist. I've discovered this year that many people here don't have much depth of understanding of our own faith tradition, and so I want to dedicate next year to exploring our faith through sermons focused on our seven UU principles, justice connections, Wellspring focusing on the six UU sources of inspiration, religious education offerings for children and youth with greater connection to UU identity, and a quarterly adult RE offering that I'll be teaching: UU University. I'll be focusing on this effort next year, along with the redesign of our Generosity Ministries and Social Justice programs (see stewardship and social justice, below), and working with the board to determine a monitoring plan for our new "ends" statements which will guide the Board's and Fellowship's work for the next five years.

There is a great deal of overlap between the Senior Minister's portfolio and the Executive Team portfolio, so this report is structured about the areas that are unique to the Senior Minister's assignments: Worship & Music, Religious Education for Children and Youth, Social Justice, Oshkosh Satellite, Stewardship Leadership, and Healthy Congregations.

**Worship Services.** Worship is an integral and essential aspect of congregational life. This year we focused on our Practice Year theme, trying new things and being ok with failing. We added the Wonder Box method during the time for all ages, and also added the responsive song "From you I receive" after the offering with the ushers bringing forward the baskets while we sing. Later, we shortened that song to only one verse, and then began repeating it again after the Congregational Response time. It was a practice in discovering what works and what doesn't. We tried for a few months to have ushers shut the glass doors to the sanctuary between the gathering song and the first hymn to allow latecomers to gather instead of trickling in, which some people find distracting. That worked for some people, but for enough others it was distressing to be outside the sanctuary waiting, so we ended the practice and will reconsider in the future how to address varying needs for sacred space versus casualness.

Having our new staff AV technician, *Adam Robinson*, has been such a gift. His continuity and skill has made last-minute changes easy and seamless, and has allowed everyone to see and hear well during worship. The addition of member *Jacqueline Corey's* volunteer service as an American Sign Language (ASL) interpreter during the second service on the first Sunday of each month has been yet another movement in the right direction for accessibility. Thank you

Jacqueline!

Some highlights (for me) include the October “Monster Month” where we practiced facing fear with courage, concluding in the fun Halloween service with the choir’s rendition (with Jay’s sermon-related lyrics!) of Monster Mash, and the spider story told in shadow puppets created by *Jodi Bremer*. I loved the reverse-offering service where money was given away, and seeing what you chose to do with your gifts. I loved the Martin Luther King, Jr. service by Rev. Leah with guest immigrant activist *Aly Wayne*. I loved the Ostara pageant starring so many of our talented kids and youth (and my first time writing a story script for this congregation!), and the Mother’s Day creativity practice service where we tried something really new and different: breakout activities!

This was my first time working with such active worship leaders, and I loved learning from and with them, and having their support in creating services. Thank you to *Karen Bruno, Dan Van Sickle, Dee Verkuilen, Connie Roop, John Newhall, Brian Murton, Leah Thibodeau, and Parnee Frederick* for their worship leadership. There was much to love in worship this year, and I appreciate your patience as I learn your traditions and also try to find my own rhythm and voice here.

**Music.** Working with Jay Thomas has been a great joy. His creativity and willingness to go to great lengths for musical excellence (and even silliness) knows no bounds! He has directed the choir, organized vocal and instrumental ensembles, created compositions of his own, written parts, conducted, rehearsed and even served as ad hoc sound engineer when asked. He has played the part of leaky pot and jack-o-lantern all with equal parts of creativity and joy. The Fellowship has been fortunate to have him, and now we look ahead to his departure and the arrival of our new music director Steve Sieck. Steve was hired after a music director search committee was assembled (Thank you, *Dee Verkuilen, Brian Murton, Jaclyn Kottman, Karen Bruno, and Mary Gerlach*) and a job posting and job description was created, and we chose to interview and hire Steve and look forward to his work with us in the coming year, and hopefully years to come! The remainder of this report on the music program was written by Music Director Jay Thomas:

"This year has seen changes for the positive in the Fellowship music program. We finally were able to hire Lawrence University choral students to sing with the Fellowship Choir on six Sundays this year, and our hope is that their involvement can be increased in years to come. Another positive addition was the Pop-Up Choir which appeared in February and April. Again, the hope is that this ensemble can become a recurring event for those looking for a chance to perform with a minimum of commitment for years to come.

I attended the UU Musicians’ Network conference in Virginia last summer, and intend to attend again this coming summer. I have been accepted into the UUA’s music leadership certification program and look forward to continuing to grow as a UU professional musician.

On a personal note, it was an honor to write an original anthem for the Fellowship Choir using text suggested by Rev. Leah Hart-Landsberg, “Running” with text by Lucille Clifton. And lastly, even though I am sad to leave this beloved community, I am very excited about

Steve Sieck taking over the position of Music Director. I look forward to visiting in the not-too-distant future to see what is happening!"

**Religious Education.** It has been a great pleasure to work with Director of Religious Education Kim Hartman who continues to bring a creative voice to the Sunday morning time when she participates in time for all ages as well as excellence in her interactions with parents and teachers. Eve Rosera has brought many gifts to her (relatively new) work as the RE Assistant, especially helping with organizational structure, and an eye toward safety and inclusion of children with different abilities. This year, the Religious Education Committee continued with Kim's and Eve's help and support, has been able to expand Religious Education Programs.

One of the goals for the RE program this year was for the RE Committee to craft a new mission and vision statement to direct the work of RE for the next few years, including any programs that include Fellowship children or youth. They took on that work diligently, and created the following statement:

The mission of our religious education program is to grow a community of compassionate young people by:

- Maintaining a safe, welcoming, and developmentally appropriate environment
- Fostering caring relationships
- Exposing them to diverse voices and religious traditions
- Engaging them in critical thinking about values in their world
- Offering opportunities for meaningful social justice work

### **Board & Governance**

This year's Governing Board held a retreat in October with Laura Park, of Unity Consulting to who had helped last year in their work around examining and updating the Mission and Vision. This year, they focused on creating new "ends" statements that will guide the Fellowship's work, and give direction to the Executive Team, for the next five years. The retreat was well attended and kicked off a year of vigorous and robust conversation around the purpose and direction of the Fellowship. New president *Samantha (Sam) Zinth* did an excellent job of keeping everyone on track, and leading the Board to consider questions of structure and purpose. Treasurer *Theresa Hannah* worked well keeping track of finances and as well as working with the Audit and Planned Giving committees to ensure financial stability for the Fellowship now and into the future. Special thanks to *Terry Dawson* who agreed to step into a sudden vacancy when *Jenny Bush* had to resign due to a change in life/work circumstances. Jenny will be re-joining the board for the coming term, pending her election, and we are so glad! All of the Governing Board members, including Sam, Theresa, and Terry, as well as *Elizabeth Van Sickle, Eric Riggers, Chilwin Tanamal, Dan Fischer, Bradley Shipps, and Andy Smock*, have worked together wisely and well on creating the new ends. They were a joy to work with; they are healthy and well-boundaried, with a clear understanding of their charge, even as we figure out the work of policy governance together. One practice we added to meetings this year was a "process report" with set questions to guide our work over the course of the meeting, encouraging respectful dialogue, fiduciary concern for the Fellowship, and bringing in marginalized voices to the conversation, and we reviewed those questions at the beginning and end of the meeting. This helped set a powerful, clear tone to our work each month.



## **Social Justice**

There has been much to be proud of in the work of social justice here at the Fellowship this year. Some examples include, but are not limited to:

- Hosting a gun violence vigil in honor of the 5<sup>th</sup> anniversary of the Sandy Hook massacre, including voices of several area interfaith leaders, and WAVE (Wisconsin Anti-Violence Effort), which got positive reports in the local paper.
- Hosting a vigil in support of DREAMers and a clean DACA bill, including the voices of local DREAMers and interfaith leaders, which got positive reports in several local area news outlets.
- Hosting a play featuring formerly incarcerated women, partnering with ESTHER.
- Filling over 100 pans of food in the Empty to Full (E2F) project for the Warming Shelter.
- Participating in the hygiene product drive and the Socktober sock drive.
- Continuing the holiday multigenerational tradition of Greater Good, which raised over \$9,500 for World Relief Fox Valley to assist refugees to gain green cards.
- Green Sanctuary offered class on living sustainably, which was successful, and has continued investigating and offering ways for our community to have a lighter environmental impact. Some members of Green Sanctuary supported a local community effort to fuse art, science, and environmental awareness with their event PopEarth.
- The Anti-Racism Team hosted three conversation sessions Anti-Racism 101 for folks new to the work of considering their own bias and role in systemic racism. This team also offered the intensive Beloved Conversations program again, with 15 participants wrestling with topics of race, privilege, microaggressions, and systemic oppression.
- We participated in two UUA-requested services focusing on racism and the voices of People of Color, including the white supremacy teach-in, and the Promise and the Practice service, including special collections for Black Lives of UU (BLUU).
- Our Shared Sanctuary Team finished more preparations for a guest in sanctuary, in case that need arises. Many volunteers bought gifts for a local family at the holidays who otherwise couldn't receive support from other nonprofits due to their undocumented status. They held a concert featuring folk musician John McCutcheon in partnership with the Friends Meeting (Quakers) and raised about \$6,000 to fund future legal-related expenses for undocumented immigrants in our community. They organized two vigils at the Milwaukee ICE offices to support a local man who was facing deportation. The first time the appointment was successful and he was granted a stay, the second time he was ordered to self-deport and the Fellowship will support his travel back to his home country to help avoid detainment.
- We held several special collections for worthy organizations including United for Puerto Rico after Hurricane Maria, Harbor House, St. Elizabeth's Hospital adolescent mental health unit, Voices of Men, and the Partner Church Council, among other Fellowship action teams. We collected \$23,273 that went outside our walls this year.
- We also held a Christmas Eve special collection for the Fellowship's Minister's Discretionary Fund which helps members and friends in need which raised \$2,159.

For more details on the Social Justice Core Team and the changes being made to the Action Team model, see the Executive Team report.

### **Oshkosh Satellite**

This year the Oshkosh satellite program continued with the leadership of *Mel Hunt* and *Kami Zuercher*, and the program coordination of *David Hegedus*. They explored various world religions this year, inviting guests from various religious communities in the Oshkosh area to speak with them, and they learned more about their neighbors in this way. One struggle this year was trying to remedy the ongoing challenge of handling money-collection for the monthly dinners. The logistical challenge of handling the money and getting it safely to the Fellowship was complex and contrary to best practices in nonprofit settings. To remedy this, Rev. Christina invited everyone to give a flat amount, to offset the total cost of dinners, and then everyone could eat “free” after that. Financially speaking, it worked well, and the problem of monthly cash handling was solved. However, it led to some consternation and stress among members and leaders of the group, and we are planning to simply fund the dinners out of the Fellowship budget for the coming 2018-19 program year. I, Rev. Leah, Jay, and Kim, all participated in the annual Winter Solstice service at the Oshkosh satellite, and I attended one other session to discuss the future of the satellite group and their hopes and dreams for the future. I am planning to lead four worship services for the coming program year for the satellite group.

### **Stewardship Leadership**

The Stewardship Team and its efforts this year were described in more detail in the Executive Team’s report. From my perspective as the new senior minister, stewardship was one area that I knew I needed to focus a lot of my energy, so I added it to the organizational chart as part of my portfolio. Business Administrator Phyllis Schmitt is still responsible for the administration aspect of our stewardship efforts, including financial tracking, but I believed stewardship needed the focus of the senior minister in order for our institution to thrive. I committed to attending almost every meeting, and we had two stewardship-themed services this winter. One of the main issues that has been facing both the Stewardship Team and the Planned Giving Committee for years has been that they are separate teams who report to separate entities (stewardship reports to staff, and the PGC reports to the Board) that often feel like they are working at cross-purposes and cross-schedules to each other. For example, the PGC doesn’t want to do a big “ask” for planned giving or Acorn Society gifts while the stewardship team is trying to do the annual pledge drive; it might be confusing to people. But, both teams are ultimately working for the same goal: raise money to support the work of the Fellowship, both now and into the future. Both teams have been discussing the need to remedy this problem for years, along with the board. With that in mind, and with the blessing of the board, we will be embarking on a year of exploration next year to examine the ways these teams could (at least) work together and (at most) combine entirely. We are calling this new joint-effort Generosity Ministries and it would also include fundraising efforts like the raffle planned for next year, and perhaps a future capital campaign to help us expand our building to allow for enough meeting space for RE classes and meetings during the week. Our hope is that the new team will be comprised of enough people that small teams of two or three can commit to certain limited tasks, instead of everyone being responsible for everything.

**Healthy Congregation Team (HCT)** is composed of *Debbie Wagner*, *Trish Huizenga*, *Mark Marnocha*, *John Duffin* and *Mark Boushele*. The HCT works to ensure that the congregation is clear on how to constructively handle conflict between members. They do not serve as direct mediators of conflict, but rather coach those involved in the conflict in accord with the

Fellowship's Principles for a Healthy Congregation. They also offer advice and counsel to the minister and/or ministry team to provide guidance. On rare occasions, they may ask a minister for direct intervention into a conflicted situation. They worked hard this year with me! They continued the work of guiding the congregation through transition this year, and they assisted in one particular conflict in a group in the congregation. They also assisted me in creating the Safer Congregation policies (referenced in the Executive Team Report) and created a new procedure document entitled Guidelines for Handling Disruptive Behavior, which will (if needed) guide staff, ministers, and/or the Board in handling excessive disruptive behavior that could be detrimental to the health of the congregation. Finally, they worked on a procedure by which transparent, non-anonymous feedback can be given to the Fellowship by people connected to our congregation. They created the Feedback Procedure at my request, recognizing that people should always come directly to someone if they have a concern, but that people often can't, or won't do that. This mechanism allows feedback (which will most likely often be preference or opinion but might also include issues that need to be directly addressed by the ministers or staff) to be offered in a clear and non-threatening way, while still not being anonymous (anonymous feedback is not helpful because context and responsibility for resolution is lost). They have finished creating this procedure and plan to officially roll it out to the congregation in August. They are an incredible resource of knowledge, wisdom and compassion, while exhibiting the best of our UU principles and Healthy Congregation practices in all that we do here at the Fellowship.

### **Closing Thoughts**

Words cannot express how grateful I am that you called me to be your senior minister. I am settling in nicely in the Appleton community with my husband Brian and son Nevan, and we are constantly in awe of how much our quality of life has improved here, over our lives in the Maryland/DC area. I feel so lucky to have the opportunity to serve such a hard-working, kind, and energetic group of people: you! One of the things that your interim ministers and previous senior minister told me when I was in the interviewing process was, "This is a healthy congregation without drama." I have found that to be very much the case here—you come to the Fellowship to connect, to socialize, to deepen your understanding of yourself and the world, and to seek spirit. I am so grateful for that, because it isn't the case in every religious community! Many ministers I know find themselves negotiating drama more often than they should.

I am tickled pink every morning to come to work and serve alongside such a fun, dedicated staff. Rev. Leah Hart-Landsberg is a colleague's colleague. She is warm and supportive, funny and also deeply skilled, particularly in pastoral care and leadership development, which are areas I enjoy but don't have nearly the skill that she does. We have enjoyed navigating our new working relationship and discovering the ways our skills and personalities fit together. Cyndi Polakowski is incredible—her eye for detail, her memory and organizational skill, and her commitment to serving the people of this Fellowship inspire me, and she keeps us all on track! Phyllis Schmitt is unparalleled in her depth and breadth of administrative knowledge, and she ably balances her desire for everything to be according to best practice (yes!) with the realities of serving a faith community where sometimes relationship is more important than policy; I'm grateful she can balance that with grace. Marie Luna is connected to everything here at the Fellowship and while I sometimes worry about her doing too much, I am also grateful for her long historical view, her ability to jump in and make something work effectively, and her constant eye toward keeping

people connected at the Fellowship. She is a leader in her field (UU Membership Professionals) and her leadership shines here, too. I already bragged about Kim Hartman, Eve Rosera and Jay Thomas earlier in this report, but suffice it to say that I love working with them, they are fun, creative, and committed to their ministries of religious education and music, and we've been lucky to have them.

*With deep gratitude,  
The Reverend Christina Leone-Tracy  
Senior Minister*

# **Associate Minister's Report to the Congregation**

## **June 2018 Annual Meeting**

As your associate minister, I continue to serve on the X-Team and oversee the Congregational Life Ministries area, which includes Wellspring, Congregational Life (Membership; Small Groups; Hospitality; Meal Ministry (formerly Neighbor to Neighbor); PR and Communications; Website; and UUA Connections) and Pastoral Care. While the leadership development committee falls under the purview of our governing board, I work closely with leadership development efforts, in particular our annual leadership class (which we offered for the fifth time this year).

Since our 2017 annual meeting, 22 people signed our membership book and pledged, thereby officially joining the Fellowship. Each of them brings unique ideas, experiences, insight and new vibrancy. I hope that everyone reading this report will be on the lookout to greet Cristina Burrill, Chris Reynolds, Jeanne Bellin, Rita Menet, Rick Menet, Marj Remsing, Scott Grade, Melissa Grade, David Velguth, Wendy Bolm, Linda Bjella, Rick Bjella, Amy Luebke, Andrew Olson, Ginger Muenster, Nancy Middleton, Doug Middleton, Marci Hoeft, Don Grogan, Jerry Iverson, Helene Iverson, Angela Braun, and their families and friends. New members, welcome!

Our Appleton Wellspring adult learning theme was Coming of Age for adults. From good and evil to life and death, the topics were big, and the speakers meaningful. This year's program culminated with a daylong retreat led by a past facilitator of the youth Coming of Age program.

After hearing and assessing feedback that our Journey Group program was starting to decline, we have invited existing groups to continue if and as they wish (many are doing so!) while winding down staff support of the program. This will allow us to focus more on expanded Saturday offerings in the coming congregational year.

Hospitality was offered at a variety of diverse Fellowship activities, from memorial services to the Passover Seder. A friendly visitor who is considering membership remarked, after attending their first non-Sunday morning worship service event, "All the hosting details are so nicely taken care of around here." Music to our ears, indeed.

Pastoral Care Team members continued to offer a supportive and listening presence to those who faced a time of need. They also served as chaplains after each worship service during our program year; what began as a temporary way to sustain connection during the senior minister transition has become an important symbol of and invitation to spiritual care for the Fellowship community. After-service chaplaincy will continue indefinitely.

In the wider community, I ended my service on Outagamie County's Citizen Review Panel, a group of citizens who work on issues of child welfare in the community. I will continue to co-chair the annual Rev. Dr. Martin Luther King, Jr. Celebration.

On June 15th, I will head out for a six month sabbatical. Having reached my seventh year of ministry at the Fellowship, I am ready for this time of rest and renewal. I know it will involve some consulting at local congregations, pottery, reading, and simply having some less structured

time to take stock of my life and the world. I will not be doing ministry with staff, members, or friends of the Fellowship during this time. Affiliated community minister and Fellowship member the Rev. Jim Coakley will serve as the part time assistant sabbatical minister during my absence; I am so grateful that we will be available as the main pastoral care contact. I am immensely grateful to have this beautiful opportunity to take some time away and will miss you all!

I bid music director Jay farewell with fondest appreciation, and deep gratitude for his wit, grace, and expertise. I am a better minister for having worked with him. It's been such a joy to help welcome my senior colleague the Rev. Christina Leone-Tracy. I continue to feel immensely lucky to work with Phyllis Schmitt, Marie Luna, Kim Hartman, Cyndi Polakowski, Eve Rosera, and Adam Robinson.

*Respectfully submitted,  
Rev. Leah Hart-Landsberg  
Associate Minister*

# **Administrator's Report to the Congregation**

## **June 2018 Annual Meeting**

It has been a busy year at the Fellowship. Along with the day to day financial activities, the operational ministries of my portfolio include personnel operations, building and grounds, technology, and financial administration of stewardship activities. In my first full year as your business administrator I have focused on examining our practices and procedures to identify improvements and gain efficiencies in all areas associated with the operational ministries of my portfolio.

As such there have been small changes, unnoticed by most, which are intended to have an impact on preserving and/or growing the financial, physical, and limited staff resources of the Fellowship. A partial list includes:

- Replaced our weathered and worn residential mailbox with a commercial grade locking mailbox, and the subsequent cancellation of our post office box. This has saved countless staff hours, by not having to make multiple trips to the post office during the week, allowing more time to focus on greeting and helping members, friends, and visitors of the Fellowship.
- A change to the Fellowship's bank account types to increase the interest earned and decrease the fees paid on our accounts.
- Sourced a new office supply company for the purchase of office and facility related supplies to reduce costs.
- Revised our money handling procedure, and purchased & installed a new drop slot safe to eliminate the need for staff to transfer money from one location to another, as well as limit access to the funds once deposited in the safe, keeping Fellowship funds more secure.
- Updated the payroll module of Power Church our church management software to reduce the potential for error and the reliance on external spreadsheets.
- Worked with the governing board to fine tune a dashboard they had conceptualized just prior to my arrival, and produced the first annual dashboard for them to utilize in monitoring attendance, membership, religious education enrollment, as well as key financial indicators.
- Served as the main internal point of contact for troubleshooting technology related issues, correcting the ones that I can and seeking outside assistance if needed, thus reducing the costs associated with our technology support.

In addition to the day to day financial and administrative activities I serve with the Senior Minister and Associate Minister as the administrative arm of the executive team (X-Team). We have spent much of our time collectively and individually reviewing and updating, or in some cases creating policies and procedures (see the executive team report for details) affecting the Fellowship's overall wellbeing and financial health.

As I embark on my second year as your business administrator, my main focus continues to be to protect and accurately report on the "assets" of the Fellowship. I will continue to review,

recommend, and implement process improvements in conjunction with the X-Team, governing board and appropriate committees and staff. Some short and long term goals around changes or improvements include exploration of a change to the current accounting system, church management system, and related technology improvements.

Of course none of us on staff do this alone. I am grateful to my fellow staff members, Rev. Christina Leone-Tracy, Rev. Leah Hart-Landsberg, Kim Hartman, Marie Luna, Eve Rosera, Jay Thomas, and especially Cyndi Polakowski, Fellowship Secretary, for not only tolerating my questions, but also supporting, and helping to implement my changes.

My thanks also to Theresa Hannah who has been an invaluable resource to me in her role as Treasurer, Liz Prior and the audit team for their exhaustive review of all of the Fellowship's financial activity, Dave Roisum and the landscape committee for doing such a great job maintaining and beautifying the grounds, and Gail Dolan (outgoing chair of the art committee), Mary Gerlach (current chair of the art committee) and entire art committee for helping to bring beauty to the otherwise boring walls around the Fellowship. I would also be remiss if I didn't recognize Karen Riggers and the stewardship team for their creative and outside the box thinking around our stewardship needs. Thank you all!

I invite you to reach out to me if you have any questions about any items that fall within my area of responsibility.

*Respectfully submitted,  
Phyllis Schmitt  
Business Administrator*



# **Audit Committee Report to the Congregation June 2018 Annual Meeting**

During this fiscal year, the Audit Committee completed a review of the financial statements for the annual period including July 1, 2016 – June 30, 2017. This review was performed using guidelines from the UUA Office of Church Staff Finances adapted for our procedures and systems. In addition to the review of annual financial reports we reviewed financial statements for quarters ended 9-30-17; 12-31-17 and 3-31-18 and reviewed monthly bank account reconciliations performed by Fellowship staff. It continues to be the opinion of members of the Audit Committee that Fellowship financial reports are accurate and fairly present the financial condition of the Fellowship, and that controls are in place and are adhered to by all responsible parties.

The audit committee reminds members and friends that YOU are a part of the financial controls of the Fellowship. At year end you receive a statement of your activity in the Fellowship's accounts. Please review that information to ensure it agrees with your records. Should you have questions or concerns please contact the Fellowship to help them ensure your information is recorded properly.

*Respectfully Submitted,  
Liz Prior  
Audit Committee Chair*

**Audit Committee Members:**

Jenny Heal  
Theresa Hannah

# Leadership Development Report to the Congregation

## June 2018 Annual Meeting

The role of the Leadership Development Committee (LDC) is to assist with the development of leaders within the Fellowship. Along with this, the committee is also charged with assisting the Board by identifying candidates and filling open positions on the Board and those committees that report directly to the Board.

This year the LDC held a highly successful six-week training program, which consisted of seven participants and was held between September 29<sup>th</sup>, 2017 and November 4<sup>th</sup>, 2017. Our annual training has adapted the Harvest the Power curriculum from the UUA to help facilitate our mission to “link the spiritual growth of each participant to the development of their own leadership skills”. A particular highlight of this year’s program was in having truly intergenerational representation!

In summary, the program has been an overwhelming success! I am so proud to report that many of those who have taken the class have gone on to serve in leadership and other roles here at the Fellowship. Based upon this and current interest, we will continue to offer the class annually.

*Respectfully Submitted,*  
**Brian Piasecki**  
*Leadership Development Committee Chair*

### **Leadership Development Committee Members:**

Anne Powling  
Julie Martin  
Suzanne Marnocha

# Planned Giving Report to the Congregation

## June 2018 Annual Meeting



The Planned Giving Committee is charged with overseeing and publicizing the Endowment. Here is a summary of the activity since the last annual meeting:

Beginning Balance May 1, 2017	\$178,661
Additions	16,501
Investment Income	2,394
Unrealized gain/(loss)	19,970
Investment/Admin fees	<u>(2,346)</u>
Ending Balance April 30, 2018	\$215,180

The year found us moving past the policy work of the previous year, working on standardizing procedures with the office and updating literature. Additionally, we focused on increasing visibility of the Endowment and the Acorn Society. Acorn Society members are those who have made direct contributions to the Endowment or provided for it in their estate planning. We currently count about 100 members, a number we hope to see increase.

As the Endowment has grown to an amount sufficient to provide a distribution of earnings according to Fellowship bylaws (only earnings can be used, gifts remain forever), we've discussed best practices concerning such distributions. We've also discussed working more collaboratively with the Stewardship Committee in the future, as both committees direct their efforts to the financial well-being of our Fellowship.

We recently organized an event to acknowledge the Acorn Society. Acorn Society members were listed in the Order of Service on May 6th and were also recognized by Rev. Leah during services that day. Additionally, the committee hosted a reception, treating "Acorns" to snacks and beverages after services. We concurrently hosted the Connections Corner, distributing literature and increasing awareness of the Endowment, inviting the congregation at large to share in the treats.

We're excited to have learned of an opportunity that could help us grow our Endowment. Made possible by a generous grant from the UU Congregation at Shelter Rock in Manhasset, NY, the Wake Now Our Vision Unitarian Universalist Collaborative Campaign will provide matching funds of up to 10% of new legacy gift intentions made between January 1, 2017 and June 30, 2020. Expect to hear more from the committee about this in the upcoming year.

Finally, membership in the committee will see some changes in the next fiscal year, but please feel free to contact us either through the office or by emailing us at [plannedgiving@fvuuf.org](mailto:plannedgiving@fvuuf.org). We're happy to address any questions that you may have.

*Respectfully Submitted,*  
**Tim Watson**  
*Planned Giving Committee Chair*

**Committee members:**

Theresa Hannah (ex-officio)

Michelle Lewis

Nate Tapio

Marta Weldon