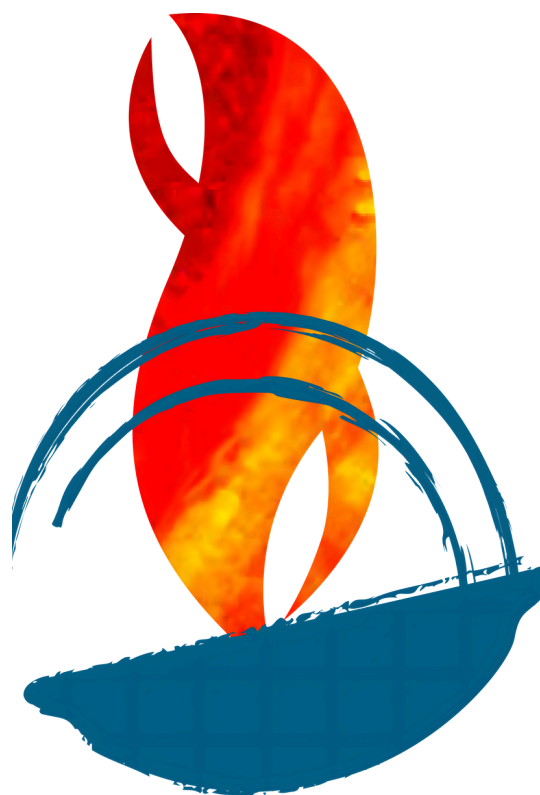


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The Fox Valley Unitarian  
Universalist Fellowship

# 2024-2025 Annual Report

We welcome seekers,  
build loving community,  
and act courageously for justice.



# Governing Board Report

Dear Members & Friends,

As we near the close of another congregational year, the Fellowship Governing Board is grateful for the opportunity to reflect on the work we've done on your behalf throughout 2024-25. With your trust and support, we have focused on stewardship, connection, and long-term vitality — all in service of our shared mission and values.

We are pleased to share several key accomplishments from this past year:

**Stewarding Our Space:** The Board deployed funds to complete a comprehensive building maintenance assessment, a foundational step toward ensuring that our physical space remains safe, welcoming, and sustainable for years to come.

**Strategic Oversight:** In collaboration with the X-Team, the Board launched a new strategic monitoring tool, allowing us to more effectively track progress and ensure alignment with our vision.

**Strengthening Staff Support:** We improved our HR and personnel processes, including staff evaluations and a comprehensive Triennial Ministerial Evaluation — deepening our commitment to professional growth, feedback, and mutual accountability.

**Supporting Generosity:** In partnership with Generosity Ministries, the Board supported donor outreach efforts through the Connection survey and Giving Intention forms — tools that help us understand and nurture the generosity that sustains our congregation.

**Planning for the Future:** We formed a Long-Range Financial Planning Workgroup to begin exploring more sustainable financial strategies for the years ahead.

**Deepening Relationships:** Board members have been increasingly present in congregational life — attending events, engaging in conversations, and building stronger connections. As your elected leaders, we believe these connections help us better reflect and serve the congregation, strengthening the fabric of our shared community.

**Active and Engaged Governance:** The Board maintained meaningful participation in monthly meetings, volunteered for additional duties/work groups, and showed strong attendance at Fellowship events, modeling the kind of involvement we hope to inspire in others.

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# Governing Board Report

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Looking ahead, we know that the coming year will bring financial challenges, including a tighter budget and the need for careful prioritization amidst a difficult operating environment. At the same time, we are confident in our community's resilience and creativity. With thoughtful planning, open communication, and a continued spirit of generosity, we believe we can rise to these challenges, emerging stronger, more connected, and more focused on what truly matters.

We are proud of the Fellowship's progress and deeply thankful for the many ways each of you contributes to the life of our congregation. The work of governance is a team effort — grounded in shared values and a commitment to our collective future. We look forward to continuing this work with care, transparency, and purpose.

With gratitude,

## Justin Fisher & Sam Zinth

Governing Board President and  
Acting Vice-President

*On behalf of the Governing Board:*

Pat Mitchell, Treasurer

Erin Vandenlangenberg, Secretary

Beth Belmore, Beth De Stasio, Brian Murton, Chris Wales  
and Marti Wheeler, Members at Large



# Treasurer's Report

The 2024-2025 fiscal year continued as last year's, with financial peaks and valleys.

Peaks:

- Building and Grounds front:
  - A new HVAC unit was installed in the office wing to replace the failing furnace. The staff now has air conditioning in the summer and improved heating in the winter. This was a win for our staff!
  - We are conducting a Reserve Study on our building and grounds. And what is a reserve study? It is a long-range plan that helps us identify and prepare for major repairs and replacement of building and grounds components. This will help us avoid surprises with things like furnaces, AC, roof, brickwork tuckpointing, and more.
- Multi-year upgrade of our IT infrastructure. This includes:
  - A successful switch to a new church management software called Empower, an online version of PowerChurch, our financial software, and data migration of our on-premises server to Microsoft 365. These changes improve our security by replacing our non-supported server. Staff are successfully accessing these systems, along with some limited access to the Care Team and eventually this will allow more access to you (our members). Although this sounds simple the Fellowship staff are working to make this change as smooth as possible.
  - And thanks to you for filling out your Connect and Commit forms which helps us have the most up-to-date contact and member information!
- Finances:
  - Our Generosity and Engagement Ministries Team (GEM), with help from our Fundraising Team had a number of fundraisers and fun events throughout the year including Fellowship fun day, Auction, Photoshoot, and Rummage Sale. We raised almost \$19,000 of our budgeted amount of \$25,000. Thank you to all who participated and contributed items!
  - Our GEM team, along with the governing board and others contacted all Fellowship members to help connect us to the Fellowship.

This brings us to the valleys:

- Giving is trending down this fiscal year and we are projecting to finish this fiscal year with a \$75,000 to \$85,000 deficit.
- We have exhausted the Payroll Protection Program money from the government; these dollars have been carrying us the last few years. And the Fellowship's staff continues to be conscientious of spending.



# Treasurer's Report

Continued from page 4

- And we are again projecting a budget deficit of \$26,032 for fiscal 2025-2026.
- This brings us to the hard conversations. Even though we value our people and programs we had to make some cuts to get closer to balancing the budget. To try to reduce this projected deficit, we had to:
  - Cut the Director of Religious Exploration from full-time to a 30 hour a week position,
  - Cut the Music Director position into multiple part time roles equating to a quarter time position, approximately 10 hours a week,
  - Significantly reduce our contribution to the UUA,
  - Keep our staff's salary stagnant for 2 years in a row (no raises),
  - Cut staff professional expenses in half, and make other smaller cuts.
- On the horizon, our mortgage has to be refinanced in the Fall of 2025 with our interest rate increasing from 3.9% to approximately 6.5%.
- Our building and grounds need upgrades to aging HVAC units, exterior work on the sanctuary and other needs as well as our wish list item of a playground.

So, as I've stated in the past, it's up to all of us to keep the Fellowship fiscally viable. **We cannot sustain it without your continued support.** We have cut spending as tightly as we can; there's no extraneous spending. **Based on the current fiscal year budget it costs on average \$1,581 per member to operate the Fellowship and its programs.** We need you, our Fellowship members to financially step up and increase your giving. Without your crucial support, the Fellowship will face significant challenges and deeper cost cuts, gradually affecting the ability to carry out our mission.

**The Audit Committee** is in a time of transition. We want to recognize audit team members:

- David Powling and Dale Lewellyn, who left the team at the end of last fiscal year, and Jenny Heal who is leaving us this year, with special recognition to Jenny Heal for being such a long-term member.
- Grant Wainio and Jim Snyder who are new to the committee,
- Eric Riggers (chairperson), Pete Mutschler and Patrick Mitchell for their continued involvement.

This group works hard to ensure your donations are accounted for and spent appropriately. This year we completed three quarterly audits of the current 2024-2025 fiscal year. It continues to be the Audit committee's opinion that the Fellowship's financial reports accurately and fairly represent the financial condition of the Fellowship, and that existing controls are adhered to by all responsible parties.

**Patrick Mitchell**

Governing Board Treasurer

# Fellowship Strategic Plan

This was the second year that we lived into a strategic plan which was created and approved by the Board, and used congregational input gathered during the creation of the mission and vision statements.

The 2024-27 strategic plan had 18 goals for this past year, within 6 areas of focus: Building & Grounds, Spiritual Growth & Congregational Life, Administration & Organization, Social Justice, Generosity & Budget Sustainability, and Communications & Public Relations.

This year, our Board worked with the Executive Team to continue our progress toward meeting these goals and monitoring our shared progress and any challenges that arise.

In May, our Board approved an updated strategic plan for 2025-2028, using the three-year rolling plan we began two years ago. The strategic plan has goals and implementation strategy for year 1 and year 2, with less strategy for year 2 than year 1. Year 3 has only goals, if anything, to allow us to continually adapt to changing times and circumstances and remain nimble in our planning. Our focus for the coming year was to reduce the scope and improve the depth of our planning, reducing the plan to 13 goals in 5 areas of focus: Operations & Administration, Spiritual Growth & Congregational Life, Social Justice & Justice Action Ministries, Generosity & Budget Sustainability, and Worship. We look forward to living into this updated plan in the coming program year.

To find more details about the strategic plan, visit:  
[fvuuf.org/governance](https://fvuuf.org/governance)  
or use the QR codes below

**2024-27 Plan:**



**2025-28 Plan:**



# Executive Team Report

Once again, another full and vibrant year at the Fellowship! This year, one of the big areas of focus was pursuing the call of Rev. Hannah Roberts Villnave as one of our settled ministers, following the commitment by the congregation last year to support a 2-minister team. Hannah's call vote was successfully held on November 17, and she and Rev. Christina moved into co-ministry on January 1, 2025. On May 3, we held Rev. Hannah's installation to this new role in a meaningful and joyful celebration.

Administratively, we continue to move forward on a transition to an up-to-date church management software (Empower) and have moved our staff to Microsoft SharePoint & Teams, with an eye toward expanding that usage to committees and lay leadership in the coming year. Be prepared to shift away from Google Drive!

One goal that our strategic plan established was that we would pursue a reserve study-- an in-depth analysis of our building and infrastructure (HVAC, plumbing, electrical systems, flooring, etc.) to plan for our future capital and repair needs, including a timeline and budget plan. After a great deal of research, including establishing that this task was beyond the scope of our current volunteer capacity, the Executive Team reviewed three proposals from different reserve study companies and selected one to do the study for us in June with results expected in July of 2025. We look forward to having this important information, especially given that last year we replaced 3 HVAC units, and in mid-summer replaced another HVAC unit in the staff wing. We are also currently under contract for tuckpointing repairs to the exterior walls of the sanctuary.

We worked with our Generosity & Engagement Ministries (GEM) team to create the Connect & Commit form and process, including Middle Hour listening sessions, 1-on-1 conversations, and the Barbie Beach Party to encourage people let us know how they want to commit to the Fellowship, in all three important aspects of membership – Engage, Serve, and Give.

Our Executive Team also worked with our amazing Fundraising Team to host several events to engage our Fellowship community and raise money for the Fellowship. Events included the Fun Day, the Drag Queen Story Time and Tea Party, the online auction, the Glitz & Glamour Gala and Live Auction, and the huge Rummage Sale, among others. It was a great deal of effort to put on these events, and we raised just under \$19,000 in the process. Last but not least, on the finance front, we also contracted with a development consultant in the fall to assist us in understanding our financial picture and fundraising processes, and we engaged the governing board in some long-term strategic planning around generosity and finances.

One area of significant challenge this year was the November election, which led to a post-election processing space that allowed for pastoral support for folks having strong feelings about the results. About 60 people attended, despite having very little advance notice.

# Executive Team Report

Continued from page 7

Quickly, our response shifted to supporting our vulnerable populations, including our LGBTQ+ population and most specifically our Transgender and gender-nonconforming members, friends and neighbors. We also had to examine our role as a sanctuary congregation, given the rescinding of the sensitive locations policy that meant ICE could now potentially enter our building. Considerable research led us to offer a “Know Your Rights” training in conjunction with Hope & Help Together, and we also trained our staff on what to do in the event ICE came to the Fellowship. We also worked with our Immigration Justice Team to determine the next steps for how to best support our immigrant neighbors, including supporting an asylee who relocated to the Fox Valley for safety.

Justice is always a priority at the Fellowship, but this year the need was heightened and more urgent. Rev. Hannah, as the lead minister for justice, worked with our justice ministries to collaborate and reach out to community organizations. She spoke at several rallies and vigils and was quoted in the news more than once. We also spent significant time this year striving to re-engage with our international Partner Churches in Romania and the Philippines and to re-invigorate our Partner Church Committee. Finally, our 3<sup>rd</sup> Annual Rising Together event had a large increase in attendance (over 60 people, which almost doubled last year). Almost half of the attendees were from other congregations, UU and other, and community organizations, several of whom assisted in the planning and implementation of the event which made it a community-wide justice endeavor.

Programmatically, we focused on three areas this year: Middle Hour, multigenerational weekend camps, and small groups/ adult offerings. We added 4 new small groups this year-- A LGBTQ+ support group, a Christian Spirituality Group, a Spanish & English Charla (Chat) group, and an Unpacking Religious Baggage Group. We also added a less-structured alternative to our Journey Group program (the new groups are Chalice Circles). We now have 10 Small Groups, 4 Journey Groups, and 3 Chalice Circles. Additionally, we added a flexible category of “opportunities and offerings” for adults that meet occasionally or for a shorter time span. Offerings like Express Yourself and Awakened Awareness have been examples of that format.

Middle Hour was an experiment to offer fun play and connection time for our children while also offering religious education or connection time for adults between our two Sunday services. We had 1-2 offerings every Sunday and plan to continue and improve on the model for the coming year. We also hosted two “weekend camps” on a Saturday and Sunday, in the fall and in the spring. Each camp offered a program for children as well as two offerings for adults. Both were a lot of fun and very well-received by participants of all ages. We hope to increase attendance at these next year.

Your Fellowship Executive Team,

**Rev. Christina Leone-Tracy, Co-Minister**

**Rev. Hannah Roberts Villnave, Co-Minister**

**Phyllis Schmitt, Director of Finance and Operations**





# Highlights of 2024-2025

## Calling Rev. Hannah as Co-Minister with Rev. Christina

*"We all-- our Fellowship, staff, and our ministers, will benefit from and grow with our co-ministry. I'm proud that our congregation is so supportive."*  
- Beth De Stasio



## Internship Program

We worked with Lawrence University to establish a for-credit internship program for an LU student to support our neurodiverse RE students. Sophia Schultz was our amazing first intern!

*"The presentation that our intern gave about neurodiversity was great! I learned about myself, too. Thank you, Sophia!"*  
- Dawn Shaw



## Our Values Take Flight: JETPIG Fall Weekend Camp

*"It was so meaningful for me to interact with my fellow UUs of all ages. What's not to love about a bunch of Jetpigs running around?"*  
- Mike Yonkers



9 kids, 18 adults,  
5 staff, 6 leaders

## Fundraising Efforts Raised a Net of \$18,475

(Gross Receipts of \$20,108 below)

Fellowship Fun Day: \$1,110

Drag Queen Story Hour, Tea Party & Gender Diversity Conversation: \$530

Online Auction, and Glitz & Glamour Gala and Live Auction: \$11,446

Portrait Photography with JBear Photo (Jerry Behrendt): \$1,271

Cabaret: \$1,379

SoUUpper Bowl: \$401

Rummage Sale & 2 Bake Sales: \$3,971



## Hosted the Appleton Ecumenical Good Friday Service

10 local congregations and Lawrence University participated, 220 people attended. We raised \$1,541 for Hope & Help Together.



# Highlights of 2024-2025

## Middle Hour

*"Middle hour is a convenient way to connect with others in our amazing community and the kiddos can enjoy playtime with friends, so everyone wins!" - Justin Fisher*



42 offerings, with an average of 5-15 adults participating per offering

## Post-Election Processing Event Nov. 6, 2024

*"Crying and singing with my loved ones and new friends was exactly what I needed that night."  
- Tam Masters*



## emBODYing Our Values Spring Weekend Camp

*"Engaged and smiling faces, laughter and learning. It was time well spent!"  
- Helene Iverson*

19 kids, 15 adults, 4 staff,  
24 adult & teen leaders



## 3rd Annual *Rising Together* Justice Event

We brought together people from the community to learn about how we can center stories and practices of healing in our activism.

We welcomed more than 60 participants, almost double our 2024 event!



## Installation Service and Celebration of Rev. Hannah



*"We were impressed by the cross-country support of ministers, with some travelling long distances to attend in person.. It was a great night!"*

*- Patrick Mitchell*



# Programs by the Numbers

**13+**

Justice Leaders at our  
First-Ever Justice  
Strategy Retreat in July

Number of  
Fellowship JAMs &  
Justice Programs

**7**

Number of  
Small Groups,  
Chalice Circles &  
Journey Groups

**17**

Average **In-Person**  
Sunday Service  
attendance

**166**

Average  
**Zoom Screens**  
attending on Sundays

**24**

**Total**  
Average Sunday  
Service attendance

**190**

Kids Registered  
in R.E.

**105**

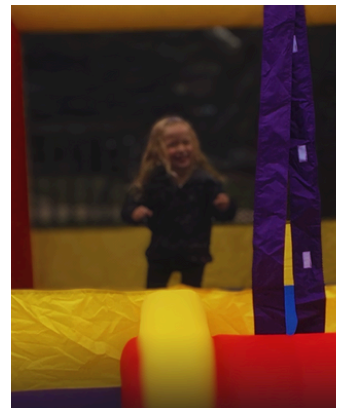
Average Weekly  
R.E. Attendance

**29**

New Members

**27**

Total Members

**502**

Adults and teens who  
regularly volunteer in  
our R.E. program

**46**



# \$21,663

Total collected  
July 1, 2024 through  
April 30, 2025

## Share-the-Plate

When we share our plate on Sunday morning, we receive necessary funds to support our ministries and we broaden our community reach by sharing generously beyond our walls.

# \$9,316

Was received to  
support the  
Fellowship's ministries

**\$907** July & August - Fellowship Justice Ministries

**\$792** September - Zion Lutheran Church  
Affordable Housing Project

**\$3,031** October - RCI Reach & UU Disaster Relief  
(*not split this month with the Fellowship*)

**\$1,091** November - ESTHER

**\$1,040** December - Habitat for Humanity

**\$1,856** January - Legal Action Wisconsin (Fellowship's Choice!)

**\$1,037** February - Hope & Help Together

**\$1,645** March - Pink Haven Coalition

**\$948** April - Fox-Wolf Watershed Alliance

**TBD** May - Fox Valley Literacy

# \$12,347

Was shared beyond  
our walls with our  
wider community



# Financial Highlights

## As of April 30, 2025

Fox Valley Unitarian Universalist Fellowship Concise Balance Sheet As of April 30, 2025			
Assets		Liabilities	
Current Assets		Short Term Liabilities	
Cash & Cash Equivalents	\$ 12,688	Taxes Payable & Other S-T Liabilities	\$ 26,798
Savings	106,553	Committee, Operational & Other Funds	145,669
Subtotal Current Assets	119,241	Subtotal Short Term Liabilities	172,467
Long Term Assets		Long Term Liabilities	
Endowment Fund	426,356	Mortgage Liability	404,271
Endowment Mission Account	41,009	Endowment Fund	426,356
	467,365	Endowment Mission Account	38,209
		Subtotal Long Term Liabilities	868,836
Fixed Assets-Land, Buildings, Furnishings, & Equipment	1,326,670	Total Liabilities	1,041,803
		Fund Balance	\$ 871,973
Total Assets	\$ 1,913,276	Total Liabilities and Fund Balance	\$ 1,913,276



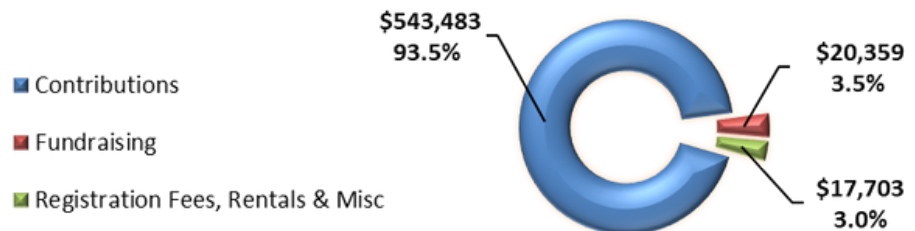
### Summary of Endowment Activity Since Last Annual Meeting

Beginning Balance May 1, 2024	\$406,230
Additions	10,000
Change in Endowment	13,234
Transferred to Endowment Mission Account	(3,108)
Ending Balance April 30, 2025	\$426,356

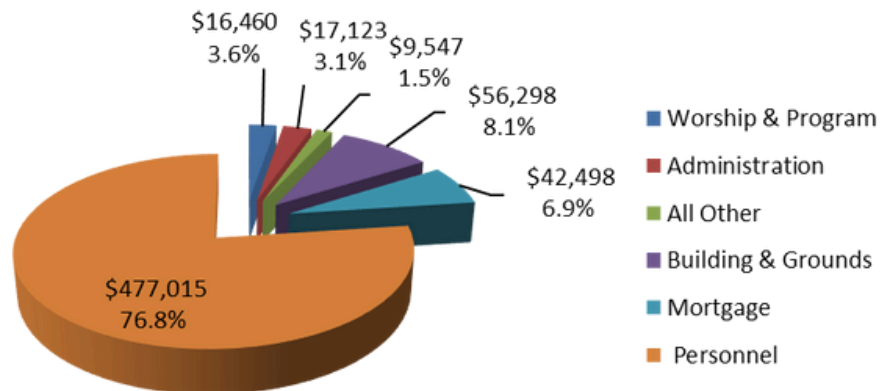
# Financial Highlights

As of April 30, 2025

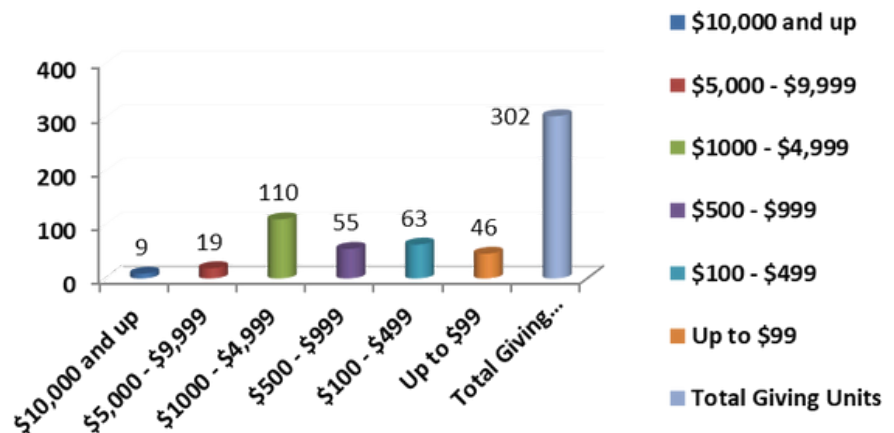
## Income by Category



## Expenses by Category



## Contributions by Giving Category



Total 2024-2025 Contributions: \$543,483



# Thank You

Our members and friends are the reason our Fellowship is a strong, healthy, vibrant community. Thank you for all you do to make this place wonderful.



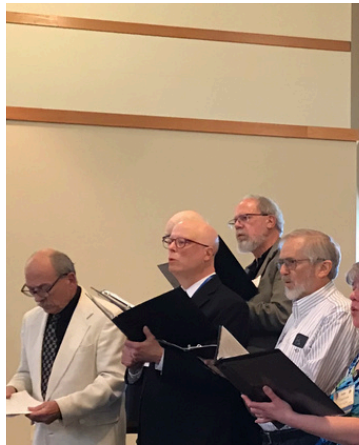
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## To continue your support:

**ENGAGE:** Participate in a group or program  
[\*fvuuf.org/connect\*](http://fvuuf.org/connect)

**SERVE:** Give of your time and talent  
[\*fvuuf.org/ways-to-help\*](http://fvuuf.org/ways-to-help)

**GIVE:** Support the Fellowship financially  
[\*fvuuf.org/give\*](http://fvuuf.org/give)

