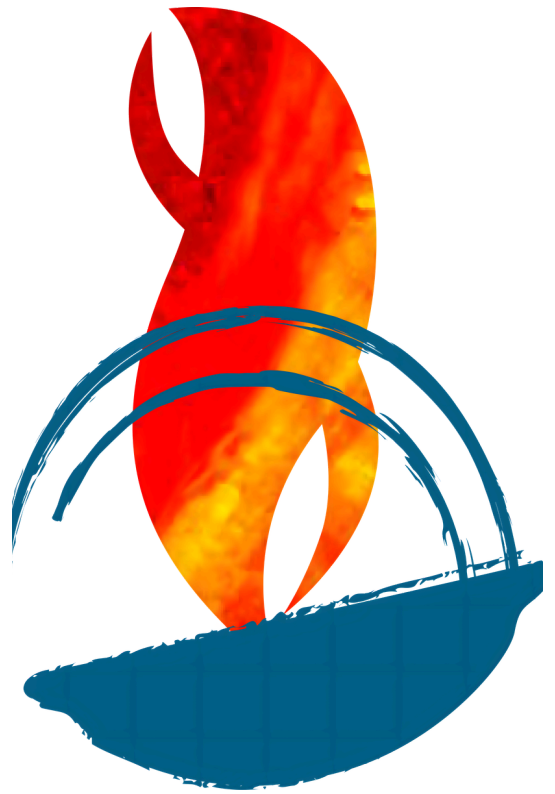

The Fox Valley Unitarian
Universalist Fellowship

2025-2026 Annual Report

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



Governing Board & Ministry Team Report

Dear Members and Friends,

We anticipated a year of financial challenges, tight budgeting, and the need for careful prioritization. We called upon our community's resilience, creativity, and collective strength to steer us onto a more sustainable path.

Looking back on the 2025–2026 congregational year, we can confidently say that you answered that call. Grounded in our Unitarian Universalist tradition, we did not just weather a difficult operating environment—we courageously restructured our leadership, fortified our infrastructure, expanded our justice work, and deepened our shared ministry. Here is a recap of how we lived out our mission, vision, and strategic goals this program year:

Building Loving Community: Staff & Operational Restructuring

When this program year began, we were sad to say goodbye to John Popke, our music director. Given budget constraints, we hired three new staff at very, very part-time hours, to support our music ministries. Brian Hutzell was our accompanist, but unfortunately left at the end of April 2026, just shy of one year with us. Rick Bjella is our Fellowship Choir director, and Tam Masters is our Music Coordinator and has been leading the Joyful Noise multigenerational Choir. Our band, mUUse, continued as a lay-led ensemble. These changes to music programs were not without bumps, but the engagement and quality of our music has been a delight to witness all year! Our proposed budget for the coming year includes some increases for music staff to continue our tradition of supporting great music here at the Fellowship.

To ensure our Fellowship remains a vibrant organization capable of sustaining long-term vitality, our HR committee undertook a comprehensive and informed staff assessment. This process included gathering feedback from our community and analyzing organizational structures at similar UU congregations.

This assessment led to the difficult but necessary strategic decision to eliminate three staff positions to make room for three new roles better aligned with our current operational and programming needs:

- **Positions Eliminated:** Secretary, Director of Religious Exploration, and Director of Finance and Operations.
- **Positions Created:** Operations Coordinator, Program and Volunteer Coordinator, and Finance Manager.

Continued on next page...

Governing Board & Ministry Team Report

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We successfully completed hiring the new roles in March of 2026. While the staff restructuring involved loss and complex feelings, we feel confident that this updated structure directly supports our goal of shared ministry, and by providing clear channels for members to engage, volunteer, and co-create our congregational life.

Stewarding Our Space & Technology

As our building maintenance assessments had warned, we faced a significant infrastructure challenge this year when three furnaces broke down, requiring major, unbudgeted repairs. Thanks to our collective stewardship, we navigated these emergencies without compromising our warm, welcoming environment.

Looking toward the future, we are continuing to invest in our home. Our Green Sanctuary team is currently researching the possibility of adding solar panels to our roof—an exciting step in living out our values. At the same time, the Board is prioritizing the financial health needed to address crucial building envelope repairs and replace aging infrastructure that is beyond its expected life.

Additionally, we modernized our digital infrastructure to improve collaboration and connection:

- **SharePoint Migration:** Shifted our primary administrative workflows from Google Docs and a local file share to SharePoint for better data security, organization, and collaboration.
- **Church Center Launch:** Rolled out this new platform to empower community members to seamlessly connect, communicate, and organize with one another.

Welcoming Seekers: Lifelong Learning & Engagement

Our vision calls us to foster curiosity and wonder in people of all ages. This year, we took intentional steps to re-imagine how we nurture personal spiritual growth and involvement.

- **Religious Exploration (RE) Assessment:** Our RE Task Force was tasked by the board to complete a deep dive into our programs, researching best practices and consulting with several peer congregations. Their final report outlines innovative, modern ideas for our youth and multi-generational ministries that we look forward to implementing in the coming years.
- **Engagement Hub:** We transitioned our Leadership Development Committee into the Engagement Hub. This change broadens the scope of this important cornerstone of our Fellowship from nurturing and supporting our leaders to also encompass all adult formation and personal spiritual growth. The Engagement Hub is supported by three new teams, or “spokes”: Adult Faith Formation Team, Membership Team, and Meaningful Fun Team.

Governing Board & Ministry Team Report

Continued from previous page...

- **Weekend Camps:** We hosted two successful weekend camps, providing much-needed space for rest, deep reflection, and multi-generational bonding. The Fall Camp was themed “Digging Deep” and included a kids’ camp, and two adult camp tracks: Heart 2 Heart, our retreat for people in committed relationships, and a UU identity track. In the Spring, we celebrated our “Blue Boat Home” with an earth-focused kids’ camp, and two adult camp tracks: one was a mycelium-inspired community organizing program, and the other was dedicated to exploring religious naturalism as a spiritual path.
- **Middle Hour Expansion:** Last year, we introduced "Middle Hour" as a convenient way to stay involved in our community without making an extra trip to the Fellowship. By offering Fun and Friends for little ones, we ensured everyone, including parents, could fully participate. This year, we expanded our Middle Hour offerings, providing more choices and therefore creating even more opportunities for deep connection. Middle Hour attendance increased from last year.

Acting Courageously for Justice: Widening Our Circle

True to our commitment to choose love over fear and collaborate with partners beyond our walls, our Fellowship put faith into action:

- **Rising Together:** The Fellowship hosted the Rising Together conference, a powerful event that brought together advocates, activists, justice-makers, and community-builders to support and strategically align justice work across Northeast Wisconsin. This was our fourth year to host Rising Together and with over 75 attendees it was our largest yet, and our focus on the spiritual foundations of police and prison abolition work galvanized our congregation and community in the face of increasing immigration enforcement.
- **Community Mutual Aid Fund:** In response to recent local and national crackdowns on immigration, we created a new Community Mutual Aid Fund. This fund is explicitly dedicated to providing tangible, compassionate support to vulnerable individuals and families in our wider community who are directly impacted by these policies. Designed as a collaborative, community-wide resource, the fund serves as a trusted vehicle where neighboring organization fundraisers and direct donations can be pooled into a meaningful place to give to this critical cause.
- **Justice Action Ministry (JAMS):** Our JAM teams offered many opportunities to learn about important causes through movie screenings, book discussions, and informative sessions. Beyond getting the word out, our JAM teams also made a difference in our wider community. They offered helping hands at local shelters, coordinated our empty to full pans and food drives, helped organize local rallies, supported our immigrant neighbors, and spearheaded UU the Vote for our region.

Governing Board & Ministry Team Report

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Nurturing Abundant Generosity

Our financial sustainability relies on contributions from everyone in our community. This year, the congregation stepped up beautifully to fund our ministries and secure our future.

- We transitioned the former Generosity and Engagement Ministries team (GEM) into a streamlined **Generosity Hub**. Like the Engagement Hub, this model distributes leadership across targeted, empowered teams, or “spokes”: Annual Giving Team, Fundraising Team, and Endowment Team.
- **Annual Giving Campaign:** Conducted a successful stewardship drive, securing the vital commitments needed to sustain our staff, programs, and daily operations into the coming program year.
- **Record-Breaking Auction:** Led by our new Auction Team spoke, the Fellowship hosted its most successful auction ever, raising over \$17,000! The auction was a “70's” themed disco party in honor of the Fellowship’s 70th Anniversary, and we welcomed our minister emeritus Rev. Roger Bertschausen to celebrate with us at the auction, and leading services the following morning.

Looking Forward

Every transformation we navigated this year, from the difficult choices in staffing to the creation of decentralized, empowerment-focused Hubs and Spokes, was undertaken with our long-term sustainability in mind along with realigning us for success in achieving our mission and vision. Thank you for your trust, your financial stewardship, and your willingness to show up for each other and the world with love and radical kindness. We enter the next congregational year stronger, more agile, and deeply connected.

With gratitude,

Rev. Hannah Roberts Villnave

Rev. Christina Leone-Tracy

Co-Ministers



Justin Fisher

Governing Board President

On behalf of the Governing Board:

Gary Crevier, Vice President

Beth De Stasio, Treasurer

Erin Vandenlangenberg, Secretary

Members-at-Large:

Beth Belmore, Jerry Behrendt, Ligia Rivera (Sept-March)

Adam Havel (April-June), Chris Wales & Marti Wheeler

Treasurer's Report

Your Governing Board sees financial reports at each monthly meeting, including year-to-date calculations of income and expenses compared to the previous year. My report to you is based on income and expenses as of the end of April, 2026. We would hope that both income and expenses would represent approximately 83.3% of the fiscal year budget (10 of 12 months). We know that both income and program expenses typically decrease in June after the program year ends, so if our income is over 83% of the amount we budgeted for 2025-2026 and our expenses are less than or near 83% of budget, all should be well by the end of the fiscal year.

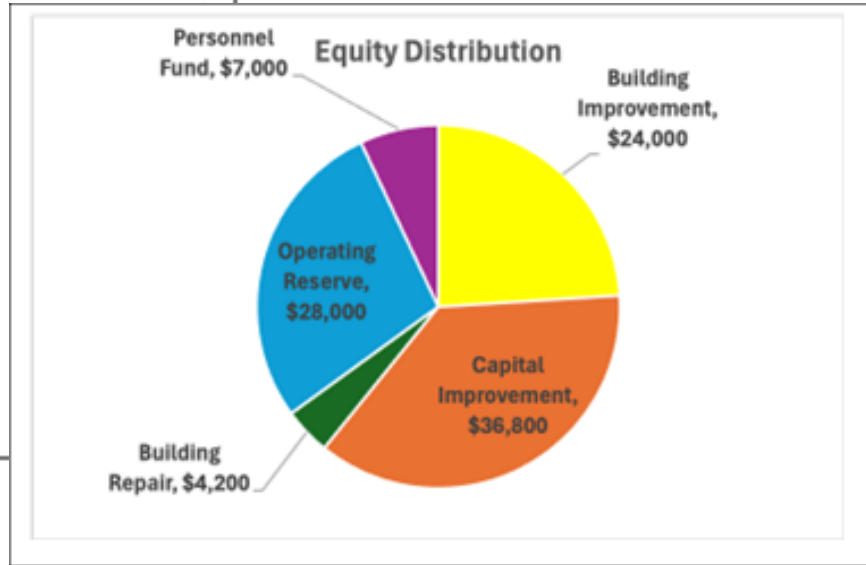
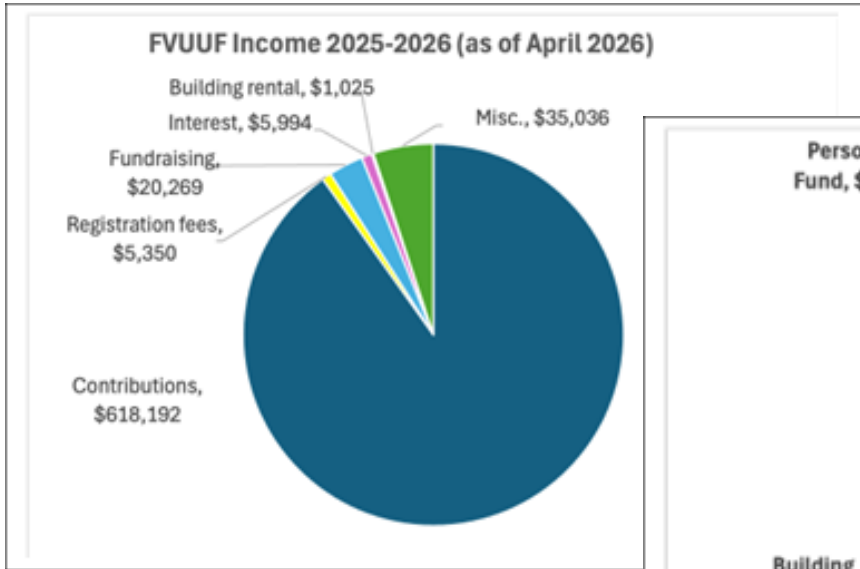
INCOME

I'm very happy to report that our total income stands at 96.88% of our budget with \$685,481 already in hand out of a budgeted \$707,583. This is terrific and tells us that we are going to meet our income goal for the 2025-2026 fiscal year! There are several categories of income (shown in the pie chart below). It is a delight to say that fundraising was very successful this year, meeting 93% of our budget expectations (Congratulations, fundraising team!) and contributions are running nearly \$75,000 more than this time last year at 94% of budget expectations, the first time we have increased our contributions over the previous year since before Covid lockdown! Also in the income category is RE and camp registration fees (83% of expected income at the end of the program year), building rental income at \$500 less than expected and interest income at 600% of expectations! Another wonderful item: miscellaneous income (gifts of stock treated differently than contributions for tax purposes and income from sharing our ministers with the Green Bay UU Fellowship) is 185% over our budgeted estimate. We are grateful for the gifts each of you bring to this Fellowship, be they monetary or gifts of your talent and presence.

Other sources of revenue include our endowment draw and this year only, the use of equity from our mortgage. The endowment draw are funds we convert to a liquid asset based on the average interest earned over the last 3 years. This year we were able to move \$26,545.49 to our endowment mission account. This account is used for items that are special projects that serve to support the long-term mission of The Fellowship. This account is not part of our regular operating budget, but it is part of our assets. The mortgage equity totaled \$100,000 and was allocated as shown in the second figure below, primarily for building maintenance and capital improvements and to establish an operating reserve.

Treasurer's Report

Continued from page 4



EXPENSES

We had budgeted for a 4.2% increase in our expenses in 2025-26 (about \$26,000) and we are close to getting it right, but not quite. The bottom line is that expenses are trending at 88% of the budget that we set a year ago, so a little higher than expected, but (thankfully) not higher than our income. Expenses stood at \$644,987 at the end of April. The large expense categories vary greatly in dollar amount; spending in those categories also ranges, from 78% of budget to being over budget by 118%. A very small misc. category is over budget by 415%, but since the total spending for this category is just \$2072, we don't need to be too upset by that. Below is a breakdown of the major expense categories and where we stand with each.

Unexpected expenses

We had unexpectedly larger expenses in repairs to three HVAC units, putting the repair budget almost \$12,000 over budget, bank fees for our mortgage refinance were double what we expected, and our supplies budget that is about 58% over budget. We have worked to correct the supplies budget in our 2026-27 proposed budget and we are using funds from our mortgage refinance to support building repair and maintenance. In addition, we paid severance to employees who left our employment since our employees are not eligible for unemployment insurance. As this was unbudgeted, the governing board decided to direct an unrestricted gift to cover this expense.

Treasurer's Report

Continued from page 4

Religious Service Expenses

Budgeted \$22,066, we have spent \$17,298 (78.4%). This category includes youth group expenses, bookstore, supplies for services and committee work and events, honoraria for visiting experts and ministers, partner church support, training, and retreats.

Personnel, Insurance and "other" Personnel Expenses

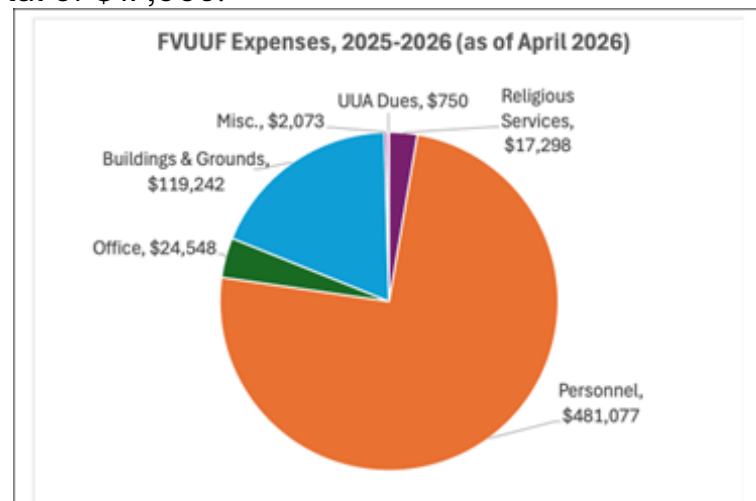
Rightly so, this is our largest expense category, for which we budgeted a total of \$553,976 and have spent 86.84% of that budget thus far. This category supports our 12 staff members, including two ministers, music staff, finance manager, AV technicians, secretary (now operations coordinator) and 3 RE staff. Included in this category are salaries and payments to retirement accounts for eligible employees. We budgeted \$104,433 for payroll taxes, ministers' housing allowance (in lieu of salary) and professional expenses (dues, training) currently at 89.5% of the budget for this category. Lastly, insurance for our personnel is at 78% of its \$81,605 budget.

Office Expenses

Items such as internet, phone, postage, advertising, and technical support belong here as does bank fees (considerably higher than budgeted due to the mortgage refinance), and on-line processing fees (also higher than expected). We have thus far expended 93.6% of the \$26,161 budgeted for this category.

Buildings and Grounds

Several larger budget categories are in this area, including utilities (budget of \$25,897 of which 79% is expended), mortgage interest (spent 81% of \$24,411 budgeted), and mortgage principal (spent \$21,518 of \$24,343 budgeted), mowing and snow removal, and building maintenance and repairs (budgeted \$40,268 and needed to overspend at \$47,894 so far). This overspending was not avoidable. We spent \$7167 to tuck point and caulk a portion of our building thus 'protecting the envelope' to prevent water and other damage to layers of our building. We also approved emergency repair of three of our heating units in the middle of winter for a total of \$17,565.



Beth De Stasio
Governing Board Treasurer

Fellowship Strategic Plan

This was the third 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 2025-28 strategic plan had 13 goals for this past year, within 5 areas of focus: Operations and Administration (inclusive of Building and Grounds), Spiritual Growth & Congregational Life, Social Justice, Generosity & Budget Sustainability, and Worship.

One focus of that plan was to create a Hub-and-Spoke structure for Engagement and for Generosity, establishing a layered approach to leadership with the board at the highest vision and goal level, the Hubs at the next level of goal setting and oversight, and the Spoke teams at the implementation level. We also set goals around financial stability, restructuring our staff team for our current and future needs, making worship adaptations, and assessing best practices in children’s religious exploration, among others.

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 2026-2029, continuing to use the three-year rolling plan model we have been following, but with a different approach to the goals. In this strategic plan, we set an overarching goal for the upcoming three years of grounding ourselves in our UU values, with a focus on lay-leadership empowerment and shared ministry. The plan has essentially the same 5 areas of focus as the previous plan, with 12 goals total. The emphasis on this year’s strategic plan is to set broader, higher-level goals so that Hub Teams can use those to create meaningful and specific goals for their Spokes to implement. Additionally, this plan calls for adding a Hub-and-Spokes structure for our Justice programs. 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 or use the QR codes below

2026-29 Plan:



2025-28 Plan:



Highlights of 2025-2026

Summer Picnic at Smith Park

Despite sweltering heat, 100+ people attended the first summer picnic that we've held in quite a while! Our GEM team organized the event and brought hot dogs, and we had plenty of food, games, bubbles and fun.



Counseling Intern



Denise Johnson was our Counseling Intern this spring, completing her 125 required practicum hours with our Fellowship for a masters degree in counseling. She supported the Care Team, Sunday RE, BATS youth group, and participated with the Gathering Circle pagan small group and the LGBTQ+ support group.

Fall Weekend Camp

"We were energized by working with the kids & adults - lots of enthusiasm and engagement!"
- Beth De Stasio



16 kids, 22 adults, 4 staff,
14 adult & teen leaders

70th Anniversary Celebration & Auction Fever

We celebrated the Fellowship's first 70 years with a 70's themed auction and celebration. The costumes and food were amazing, and a great time was had by all.



We raised almost \$20,000 for our budget!



2nd Annual Drag Queen Sunday

We welcomed back Anita Bobbypin to participate in our dress-up themed Halloween service and then share stories and activities with our young people while adults discussed how to respond to anti-trans rhetoric.

Highlights of 2025-2026

Middle Hour

"Middle Hour is a nice way to get a "taste" of something I want to learn more about later, while meeting a greater cross-section of people at the Fellowship."

- Deb Andrews



36 offerings, with an average of 27 adults participating per Sunday

"You Are Not Alone" Care Team Dinners & Events

"There was an absolute feeling of inter-connectedness and community in the room during both of these programs!"

- Debra Morningstar Westenberger



Spring Weekend Camp

Despite being cut short by a record-breaking snowstorm, we had a lot of fun celebrating our Blue Boat Home!

19 kids, 21 adults, 3 staff, 10 adult & teen leaders



4th Annual Rising Together Justice Event

We brought together people from the community to learn about the spiritual and practical aspects of police and prison abolition work.

We welcomed more than 75 participants. It was definitely our largest event yet!



Meaningful Fun Team Events

Bring-a-Friend Fun Day & Activity Fair

Stone Soup Holiday Fun Event

"Waddle This Way" All Ages Dance Party



Programs by the Numbers

22
Committees and Teams

105
Lay leaders on those teams

6
Fellowship JAMs & Justice Programs

49
Active leaders & participants

Number of Small Groups, Chalice Circles & Journey Groups

15

Average In-Person Sunday Service adult attendance

166

Average Zoom Screens attending on Sundays

24

Total
Average Sunday Service adult attendance

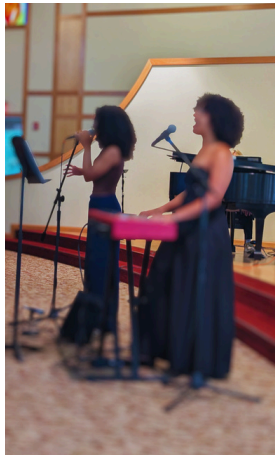
190

Kids Registered in R.E.

88

Average Weekly R.E. Attendance

34



New Members

16

Total Members

455



35
Adults and teens who serve as regular volunteers in R.E.





\$22,302

Total collected
July 1, 2025 through
April 30, 2026

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.

\$1,431 July & August - Fellowship Justice Ministries

\$941 September - Diverse & Revolutionary UU Multicultural Ministries (DRUUMM)

\$1,189 October - Fox Valley PRIDE

\$1,042 November - Double Portion Soup Kitchen

\$1,192 December - Hope & Help Together

\$1,393 January - ESTHER Interfaith Organizing

\$1,475 February - Pink Haven Coalition

\$1,326 March - Community Mutual Aid Fund

\$1,162 April - Menikānaehkem

TBD May - Wisconsin UU State Action Network

\$11,151

Supported the Fellowship's ministries

\$11,151

Was shared beyond our walls with the wider community.

\$1,967

Was also received during our Christmas Eve offerings to support our Ministers' Discretionary Fund.



Financial Highlights

As of April 30, 2026



Summary of Endowment Activity

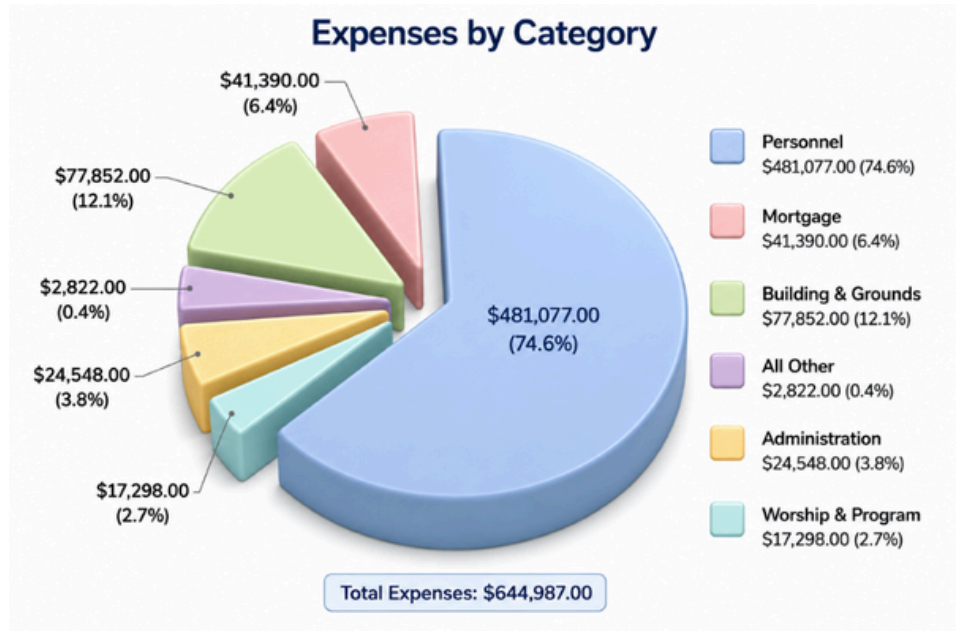
"we sit in the shade of trees we did not plant..."

for more information about the Fellowship's endowment and how to join the Acorn Society, visit www.fvuuf.org/endowment

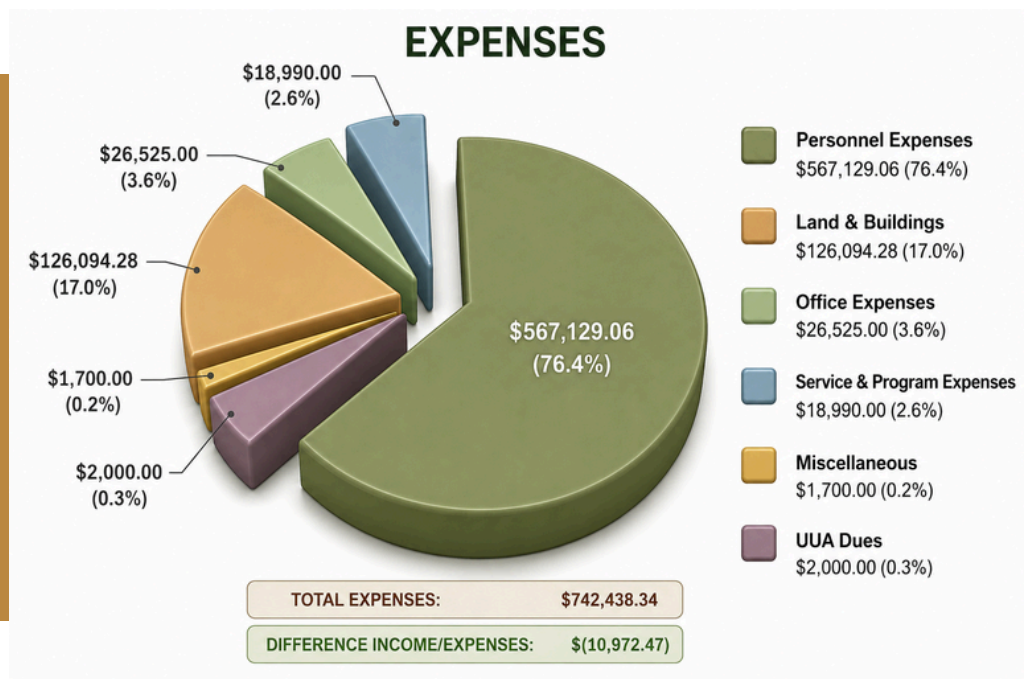
Beginning Balance May 1, 2025	\$453,337.52
Additions	\$ 500.00
Transfer to Endowment Mission Acct	\$ (26,545.49)
Earnings - Fees	\$ 53,027.07
Ending Balance April 30, 2026	\$453,337.52

Current & Proposed Future Budget Expenses

**2025-26
Current Year
Budgeted
Expenses by
Category**





**Proposed
2026-27
Budgeted
Expenses
by Category**



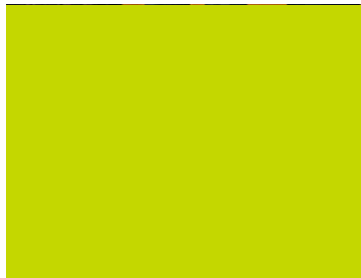
Thank You

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.

 920-731-0849

 2600 Philip Lane, Appleton WI 54915

 www.fvuuf.org



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ENGAGE: Participate in a group or program
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GIVE: Support the Fellowship financially
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