

2022-2023

Annual Report



First Unitarian
SOCIETY OF MILWAUKEE
nurture. engage. inspire.

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The First Unitarian Society of Milwaukee

A Unitarian Universalist Congregation

Established 1842

ANNUAL REPORT

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ANNUAL REPORT

STATISTICAL INFORMATION

2022-2023 Operating Budget: \$1,046,000

Adult Members: 714

Church School Enrollment: 62

Contributing Households: 392

MEMBER

- Unitarian Universalist Association (UUA)
- MidAmerica Region, UUA (MAR)
- Common Ground of Southeastern Wisconsin
- Interchange, Inc.
- Interfaith Council of Greater Milwaukee
- Milwaukee Inner-City Congregations Allied for Hope (MICAH)

CHURCH STAFF

SENIOR MINISTER

The Reverend Jennifer Nordstrom

ASSOCIATE MINISTER

The Reverend Dena McPhetres

MINISTER OF RELIGIOUS EDUCATION

The Reverend Kimberlee Tomczak Carlson

ASSISTANT SABBATICAL MINISTER

The Reverend Jim Foti

DIRECTOR OF ADMINISTRATION

Jean Johnson

MEMBERSHIP DEVELOPMENT COORDINATOR

Lynne Jacoby

OFFICE MANAGER

Shari Wright

FACILITIES MANAGER

Ken Liddell

FACILITIES ASSISTANT

Jim Spice

CHURCH STAFF CONTINUED

LEAD MUSIC DIRECTOR

Alissa Rhode

CHORAL DIRECTOR

Tristan Strelitzer

COLLABORATIVE PIANIST

Teresa Drews

YOUTH PROGRAM COORDINATOR

Deb Solis

EARLY CHILDHOOD COORDINATOR

Mariah Groshek

NURSERY CAREGIVER

Cecelia Groshek

A MESSAGE FROM THE PRESIDENT

It's been quite a church year, hasn't it? Think of how far we've come, and all we have accomplished together!

Despite the loss and grief of the past several years, this year we have seen our community coming back strong.

Remember that when we started the church year, we were still wearing masks in meetings as well as during services – and there was no coffee at coffee hour! Thankfully, we have been able to relax many of the COVID precautions. It wasn't easy to keep masking at church, but it was important for us as a welcoming congregation to keep everyone as safe as possible.

Many of our beloved activities have returned in person this year, including Adult Spiritual Development programs, social justice activities, Defend Democracy campaigns, community building groups and more.

While the pandemic may feel behind us in some regards, it has changed all of us forever – and it has changed our community forever as well. The transition back to in-person activities has provided us with an opportunity to re-evaluate.

While in-person Sunday service attendance has not yet returned to pre-pandemic levels, when combined with our online viewership the total numbers are getting close. Indeed, virtual programs continue to be a crucial way for many members and friends to connect.

In addition, we've been heartened by the fact that recent Journey to Membership classes have seen many new faces starting on the path to join our community.

And together with our families and volunteers, Rev. Kimberlee has begun the process of exploring a new model for faith formation for our children.

Your Board of Trustees has been busy as well.

Due to reduced staff capacity this church year, the Board agreed to focus its monitoring on only the most essential church policies. This allowed us time to tackle other efforts including assistance with the Forge Our Future Campaign, setting up the Endowment Fund Task Force, and discerning our position on proposed changes to Article II of the UUA Bylaws.

The Board of Trustees is extremely proud of the Forge Our Future Campaign! Dozens of campaign volunteers made hundreds of visits, calls, texts and emails. And our members stepped up with incredible donations that will have an impact on our community for generations to come. This was a heavy lift that not only improves the church's financial stability, but brought us together to

reconnect. Thank you, thank you, thank you to everyone involved!

The Board of Trustees is also supremely grateful for the members of the Forge Our Future Endowment Task Force, which is working hard to establish the legal parameters for the investment fund that will hold those donations. We expect that they will conclude the majority of their work this fall and will be communicating their progress frequently.

Once pledges are fulfilled, the Forge Our Future Fund will provide a solid financial foundation for our congregation going forward. However, the results of our Annual Pledge Campaign appear to be lackluster as of this writing in late April. This signals that we still have work to do to maintain our church community as the thriving spiritual home that we have all come to expect and cherish.

As a result of the flat Annual Pledge Drive, the Board will likely need to pass another deficit budget for the 2023-24 church year. Increases in Human Resources costs are driving much of the deficit. Some of the increase is related to inflation, and some is due to our continuing efforts to bring all staff members up fair compensation levels set by the UUA. We are hopeful that deficit budgets will not be needed in coming years as the congregation increases its annual pledges and fulfills on the promised contributions to the Forge Our Future Fund.

Preparing for Rev. Jennifer's sabbatical was a major focus of the Board's work this year as well. We crammed a lot of our annual work into the months before she left, and have been extremely pleased with the hard work that staff have done to keep everything running smoothly since. They have stepped up admirably!

Of course, we know that next year's Board has much work to do. We want to continue to engage more deeply in Anti-Racism work, advance efforts to come into compliance with a handful of policies, re-engage with strategic planning efforts and prepare for upcoming capital maintenance needs.

I would like to thank the Board of Trustees for their dedication to our community. And on their behalf, I want to express our profound gratitude to the committees, groups, volunteers and staff who make our community a nurturing, engaging and inspiring place to explore the big questions together.

Onward!

Ben LeFort

ENDS STATEMENTS

We, the people of First Church, build community where we:

1. Value, develop, and celebrate the gifts that come from authentic connection across difference, emphasizing racial, ethnic, and generational difference.
 2. Recognize power differences and challenge injustice where it arises.
 3. Follow the leadership of people most affected by injustice, partnering to move the Milwaukee community toward justice.
 4. Generously give and receive support, connection, and care in times of joy and challenge.
 5. Promote Unitarian Universalism and our shared values in the world.
 6. Open ourselves to wonder, making ourselves vulnerable and available to find meaning, inspiration, and transformation.
 7. Create communal experiences celebrating our interconnectedness.
 8. Create accessible, courageous, and innovative welcome to people who might find a sense of belonging and a spiritual home with us.
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VALUES

At the heart of First Church, we value:

Wonder

Authentic Connection

Love

Justice

MISSION STATEMENT

We gather together to:

Nurture the Spirit. Engage the Mind. Inspire Action.

2019-2020 ANNUAL FINANCIAL REPORT

Overview

In compliance with Board policies 4.4 and 4.5, the Finance Team oversees the financial condition of the church by:

- Monitoring/Managing financial performance of investments to determine if it is in compliance with the budget;
- Analyzing financial data and developing alternatives and strategies when necessary;
- Preparing the budget for each new fiscal year;
- Serving as a resource for teams, ministries, and the Board concerning financial matters.

The Finance Team closely monitors the financial results of our church and keeps the Board of Trustees and the congregation informed of any significant developments. We generate projections to help forecast the financial condition of the church over the near and long term and to assist with the formation and maintenance of a balanced budget. We develop strategies to help improve the financial status of the church as needed, while trying to fulfill the diverse program goals established to pursue the church's Ends.

I would like to thank the team members: Tom Briscoe (Treasurer), Gordon Mueller, Trent Muller, Ron Oshima, Al Jaberg, Holly Patzer, Alisha Koneazny, and the staff lead, Jean Johnson for their many hours of hard work and valued input. Without their dedicated involvement, this team could not accomplish its important responsibilities.

Income and Expenses

July 1, 2021 – June 30, 2022

The following page compares the budget and final income/expense statement for the 2021-2022 church year. The first section shows the income while the second section shows the operating expenses for the year. Ideally, the income should balance the expenses to yield an Income Net of Operations of \$0 or a balanced budget. The Finance Team budgeted a negative balance of \$151,982 for the church year. Final numbers for "Income Net of Operations," not including extraordinary income, show a negative balance of \$140,919 (\$11,063 better than expected).

- Income**
- Total income was \$799K which was 6% (\$52K) below the budget of \$851K.
 - Pledges (\$728K) were below budget 1% (-\$6.7K).
 - Total activity income (\$1.8K) was below budget 94% (-\$27K) due to COVID restrictions. Feast for Funds was cancelled.
 - Investment income (\$17.5K) was below budget 40% due to lower interest rates .
 - The apartment income was below budget 15% due to vacancies, turnover and maintenance.

- Expense**
- Total expense was \$940K which was 6% (-\$63K) below the budget of \$1,003K:.
 - Human Resources expenses were below budget 9% (-\$34K) due to vacant staff positions.
 - Building expense (-7%); Basic Operations (-9%); Committees (-36%) were below budget due to COVID restrictions.
 - Krug Projects/Thaney Fund/Music Fund was 6% below budget due to COVID restrictions.
 - There was no Morter Lecture this year.

Income Net of Operation was -\$141K, a 7% decrease from the budgeted deficit of -\$152K. The pledges in future years must increase, or other income streams established, to cover this cost for First Church to become fiscally sustainable. Extraordinary income includes \$77K from bequests and -\$219K (loss) from Investments. The stock market experienced significant losses in the first half of 2022.

The final Net Income including Extraordinary Income was -\$283K.

FUSM 2021-2022 INCOME & EXPENSE HIGH LEVEL SUMMARY

ITEM	'21 - '22	'21 - '22	Variance	
	BUDGET	FINAL	Amount	%
<u>Contributions</u>				
Pledges	735,000	728,234	(6,766)	-1%
Other Contributions	36,500	33,517	(2,983)	-8%
Total Contributions	771,500	761,751	(9,749)	-1%
<u>Activity Income</u>				
Feast for Funds	20,000	-	(20,000)	-100%
R E Fees	3,500	2,200	(1,300)	-37%
Other Sources	5,535	(392)	(5,927)	-107%
Total Activity Income	29,035	1,808	(27,227)	-94%
<u>Investment Income</u>	29,000	17,530	(11,470)	-40%
<u>Apartment Income Net of Expenses</u>	21,000	17,930	(3,070)	-15%
TOTAL INCOME	850,535	799,019	(\$51,516)	-6%
<u>Human Resources</u>				
Salaries, Wages & Minister Housing	595,156	570,014	(25,142)	-4%
Professional Expenses	26,058	17,450	(8,608)	-33%
Insurance - Health & Disability	88,500	88,649	149	0%
Retirement Savings - all staff	48,800	51,168	2,368	5%
Payroll Taxes	28,500	25,060	(3,440)	-12%
Other	13,700	14,055	355	3%
Total Human Resources	800,714	766,396	(34,318)	-4%
<u>Budgeted Contributions</u>	23,431	21,331	(2,100)	-9%
<u>Building Expenses</u>	67,300	62,918	(4,382)	-7%
<u>Basic Operations</u>	76,383	69,752	(6,631)	-9%
<u>Religious Education</u>	7,152	5,640	(1,512)	-21%
<u>Committees</u>	27,537	13,901	(13,636)	-50%
<u>Extra Operations</u>				
Transfer from Fund Balance	(39,180)	(50,077)	(10,897)	28%
Capital Maintenance	10,000	27,242	17,242	172%
Krug Projects/Thaney/Music Fund	24,180	22,835	(1,345)	-6%
Mortar Lecture Committee	5,000	-	(5,000)	-100%
Total Extra Operations	-	0	0	
TOTAL EXPENSES	\$1,002,517	\$939,938	-\$62,579	-6%
INCOME NET OF OPERATIONS	-\$151,982	-\$140,919	\$11,063	7%
<u>Extraordinary Income</u>				
Bequests	\$25,000	\$76,596		
Gain/Loss on Investment	\$0	-\$218,720		
EXTRAORDINARY INCOME	\$25,000	-\$142,124	-\$167,124	
NET INCOME	-\$126,982	-\$283,043	-\$156,061	

Investment Report

In compliance with Board policy 4.6.10, the Finance Team actively monitors our investments and manages the funds per our investment policy goals and objectives. The full investment policy is available on request.

On June 30, 2022, First Church had four CD's valued at \$189K. This money satisfies the safety net of 15% of budgeted expenses as well as the additional 15% to mature in less than 3 years. The remaining funds in the General Fund as well as the Memorial Trust Fund were invested in the UU Common Endowment Fund which is managed to approximate 60% bonds and 40% equities.

The UU Common Endowment Fund had a net return on investment of -16% for the Fiscal YTD due to losses in the stock market during the first half of 2022. Additional investments include a Brewery CU CD with 0.5% interest, a Self-Help CU CD with 0.4% interest, a Landmark CD with 0.45% interest, a Columbia S&L CD with 0.45% interest and two investment accounts with WWBIC at 1% and 2%.

Balance Sheet

June 30, 2022

Total net assets were \$1,801K, which was 17.7% lower than June 30, 2021. This is attributed to the loss in investments (-\$218K) in the stock market as well as the deficit in the Income Net of Operations (-\$141K).

Description of Funds:

Restricted (by donor) Funds

Morter Fund:	This fund was established in accordance with a bequest of a former member. The funds are designated to sponsor seminars on individual responsibility.
Memorial Trust Fund:	This fund contains unspecified bequests. Money placed in the fund can be expended or borrowed against only by a super majority of the congregation. The Finance Team manages it. A fixed percentage of the fund's assets provide quarterly income to the church's operations.
Close the Gap Fund::	This fund contains donor money to be moved to the Endowment Fund once it is established.
Capital Campaign:	This fund contains restricted funds that the Board designated for the Forge our Future Capital Campaign to establish an Endowment Fund.

Unrestricted Funds Designated by the Board

Capital Maintenance Reserve:	This fund contains unrestricted bequest and donations that the Board designated for capital improvements.
Krug Special Programs Fund:	This fund was designated by the Board in March 2019 to fund special projects in 2019-20 through 2021-22. Some projects were postponed due to the pandemic and will continue when feasible. The Music Programs Fund is a subset of the Krug Special Programs Fund.

Unrestricted Funds

Unrestricted Fund Balance:	This fund is the amount retained after payment of expenses or the allocation to designated funds. It increases during fiscal years in which there is an operating surplus and decreases during years in which there is an operating deficit. For fiscal security, the Board has adopted a policy of maintaining a balance in this fund that is equal to or greater than 15% of the operating expenses for the most recent fiscal year. If the balance drops below this 15% level, the restoration of the fund becomes a fiscal priority.
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Noreen Gilbertsen
Finance Team Chair

FUSM BALANCE SHEET FOR FY 2021-2022

6/30/2022

ASSETS		
	June 30, 2021	June 30, 2022
CURRENT ASSETS		
Cash	-\$10,021	\$37,767
Money Market	\$100,243	\$182,142
Other	\$3,320	\$15,720
Total Current Assets	\$93,542	\$235,629
INVESTMENTS		
Memorial Trust Fund - UUCEF	\$397,974	\$317,347
Calvert 1.5%	\$11,427	
WWBIC	\$10,000	\$21,435
CD's	\$319,309	\$188,679
General Fund - UUCEF	\$1,356,945	\$1,038,407
Total Investments	\$2,095,655	\$1,565,868
TOTAL ASSETS	\$2,189,197	\$1,801,496
LIABILITIES AND FUND BALANCE		
CURRENT LIABILITIES		
Prepaid Pledges	\$48,727	\$41,705
Apartment Security Deposit	\$3,274	\$3,244
YRUU Account & Mission Trip Savings	\$5,305	\$5,305
27th Pay Period Accrual	\$18,734	\$20,434
Sabbatical Accrual	\$10,184	\$15,184
Other Liabilities	\$16	\$4,926
Total Current Liabilities	\$86,239	\$90,797
RESTRICTED FUNDS		
Morter Fund - Donor Restricted	\$64,247	\$64,247
Tom Thaney for the Arts	\$1,980	\$3,980
Capital Campaign		-\$7,500
Memorial Trust Fund	\$397,974	\$317,347
Close the Gap Fund	\$25,000	\$50,000
Minister's Discretionary Fund	\$4,363	\$8,266
Total Restricted Funds	\$493,564	\$436,340
UNRESTRICTED FUNDS		
Unrestricted Fund Balance	\$944,625	\$1,303,990
Net Income	\$361,278	-\$283,043
Capital Maintenance Fund	\$10,204	-\$17,038
Krug Special Programs Fund	\$292,056	\$262,809
Music Programs Fund	\$1,231	\$7,643
Total Unrestricted Funds	\$1,609,393	\$1,274,360
TOTAL LIABILITIES AND FUND BALANCE	\$2,189,197	\$1,801,497

BOARD COMMITTEE & TASK FORCE

NOMINATING COMMITTEE

As a committee of the board, the Nominating Committee is charged with nominating members for the Board of Trustees and the Nominating Committee. The Nominating Committee met monthly since September 2022. The members of the Nominating Committee reached out to both new and established members of the congregation via one-on-one relational meetings to identify skill sets and areas of interest so that we could guide members toward meaningful and impactful engagement with First Church, and identify potential candidates for the Board of Trustees and the Nominating Committee. This year, we continued our work from the previous year by focusing on learning more about the life experiences or attributes of the members of our congregation that can bring diversity of background to our leadership teams. The six members of the Nominating Committee conducted approximately nine one-on-one meetings and also reached out to four additional members this church year to discuss how they might like to be involved as a leader. We find this process of one-on-ones to be an important way to become acquainted with members of the church and to hear their thoughts on lay leadership.

We connected with current board liaison Mike Hogan to determine anticipated needs and skillsets for Board of Trustees members, and connected with Senior Minister Jennifer Nordstrom and Forge Our Future Endowment Fund Task Force member Kathy Rivera to identify people in our church community that we should talk to about church involvement and potential leadership.

In addition to ourselves, Nominating Committee members this year were: Anne Alexander, Jason Luedtke, Jessie Moffat, Susie Seidelman, and staff liaison, Jean Johnson. We offer our thanks and appreciation to those many generous and talented members of our congregation who have responded to the call of leadership.

Tom LeBel and Kristine Hansen, Co- Chairs

ENDOWMENT FUND TASK FORCE

In January the Board of Trustees formed the Forge Our Future Endowment Fund Policy Task Force with the charge to draft and recommend policy documents to create an Endowment to hold the monies raised by the Forge Our Future campaign.

These policies will define the purpose of the endowment and how to protect the principal, separate the funds from other First Church investments, set guidelines for withdrawals, and identify an investment vehicle and fund manager.

Since January, the task force has met regularly and begun researching various options and best practices for setting up Endowments by contacting numerous foundations, religious and social organizations, potential outside counsel, and experts in the field. We feel we are making good progress and plan to provide a report with our recommendations to the Board of Trustees when it resumes meeting in fall 2023.

Members of the task force are: Elizabeth Lentini (co-chair), Dave Becker (co-chair), George Bledsoe, Tom Briscoe, Ron Oshima, and Kathy Rivera.

Elizabeth Lentini and Dave Becker, Co-Chairs

FORGE OUR FUTURE

It Took a Village

The 2022-23 Forge Our Future (FOF) campaign was certainly an “all hands on deck” endeavor, with our committed staff and over 50 congregation volunteers contributing to its success. A core group of 30 people attended weekly Zoom meetings and engaged in numerous personal stewardship visits. Others assisted with Focus Group facilitation, campaign communication and promotion, provided heartfelt testimonials, or helped to ensure we had fun kick-off street party.

BOARD COMMITTEE & TASK FORCE

(Continued from page 10)

Staff: All First Church staff went above and beyond their regular daily duties to fully support the campaign. Rev Jennifer Nordstrom was our very hands-on inspirational leader. Jean Johnson and Shari Wright kept all of the extraordinary administrative wheels moving. In addition, Rev. Jennifer Nordstrom, Rev. Dena McPhetres, Rev. Kimberlee Carlson, Lynn Jacoby and Deb Solis did numerous one-on-one visits with church members.

Congregation: Bob Balderson, Dave Becker, Mark Bishop, George Bledsoe, Julie Bock, Michelle Boehm, Rod Botts, Cheri Briscoe, Laurel Brooks, Connie Craig, Matt Byrnes, Jessie Diliberti, Kathy Donius, Jill Erickson, Sarah Fowler and Matt Poulson (Ruckus & Glee), Jerry Fredrickson, Kari Gunderson, Rollie Hanson, Candice Haight, Joan Hansen, Nick Hayes, Tom Hester, Crysta Jarczynski, Drew Kennedy, Lisa Koneazny, Pete Koneazny, Stacy Koenen, Angi Krueger, Caroline Kuebler, Andy Larson, Ben LeFort, Sally Lewis, Vashti Lozier, Jason Ludtke, Pat McFarland, Mark Miller, Gordie Mueller, Desiree Pointer-Mace, Ron Oshima, Nancy Pajewski, Amanda Panciera, Tony Panciera, Marisa Riepenhoff, Sarah Richards, Kathy Rivera, Caroline Robbins, Bizzy Schultz Dale Skaggs, John Stano, Thea Waters, Don Weimer, Amy Wilbourne, Jacki Zandi

The Path to the Forge Our Future Campaign

Early on, the Strategic Plan Team led the congregation through a process to strategically create a financially sustainable future.

At the annual meeting on May 16, 2021, the congregation passed a resolution: "Grow First Church's income to close budget gap and address First Church's long-term structural deficit."

This resolution was the impetus to pursue a capital campaign that would ultimately create a principal-protected endowment intended for long-term investment. Our annual pledges are our primary source of

income to support essential church operations. Creating a principal-protected endowment enables us to utilize the investment earnings to diversify and increase our revenue streams to close the gap between annual operating income and annual operating expenses. The endowment will also help fund expanded ministries and community connections. We have been dreaming for a long time of becoming a more multicultural, multiracial church that is a growing beacon of progressive values and an even more active collaborator for justice in the community.

The Campaign Process

Our assigned campaign director from the consulting firm Klote & Assoc, Glenn Wagner, provided intensive coaching and full-time operational capacity and support to ensure our success. In-depth planning began in the summer of 2022, leading to 14 Focus Groups, both in-person and virtual, to provide an opportunity for congregational input as we embarked on the campaign. Volunteer facilitators walked us through the church history and the plan for the future, eliciting feedback, both verbally and in written surveys. This feedback was critical in finalizing the campaign strategy, creating a beautiful campaign "View Book" and assisting church leadership in setting a campaign goal. Throughout the entire campaign, numerous volunteers also engaged in ongoing testimonials during Sunday services and on the church website and social media platforms, expressing the importance of First Church in their lives and why they were supporting the campaign.

An exciting Campaign Kickoff service took place on October 23rd, announcing the Forge Our Future goal of \$3 Million! After the service, we had a fun time at our Halloween street party with live music, street dancing, a delicious Filipino food truck, kids' activities, costume contest and of course cake!

BOARD COMMITTEE & TASK FORCE

(Continued from page 11)

The hallmark of the Forge Our Future campaign was the effort to reach every household through one-on-one visits, both in-person and virtual. The visits were a much welcomed experience for both visitors and invitees after the challenging pandemic months. The authentic connections made during these visits were very enriching for all involved and went far beyond raising funds. Some visits led to referrals for pastoral care, a critical aspect of our church ministry. Thirty-four volunteers engaged in these visits with 248 households participating in a personal visit and 205 households making a pledge to the FOF endowment. Church members were offered a three year period to fulfill their pledge. To present the full range of stewardship opportunity, campaign visits also included an appeal for the 2023-24 Annual Pledge Drive to support ongoing church operations.

On February 5, we held a campaign celebration to mark the end of the primary phase of the FOF campaign, having raised \$2,724,303 to create our principal - protected endowment. We had a fun and celebratory Sunday service complete with costumes and of course cake! Given the campaign's three year pledge fulfillment schedule, endowment pledges and contributions made during this period hold potential still for reaching the original goal of \$3 Million. As of the end of April, \$702,000 has actually been collected and is being held in a segregated and restricted account until the endowment is in place.

The Forge Our Future campaign was a significant undertaking that would not have been possible without dedicated staff going above and beyond their regular workload, a dedicated troupe of volunteers working in numerous capacities, and of course the inspiring generosity of our congregation and its commitment to First Church's future sustainability and vitality.



ANNUAL MEETING MINUTES: May 22, 2022

BOT Members Present: Jane Cliff (President), Ben LeFort (Vice President), Tony Panciera (Secretary), Dianna Dentino, Rollie Hanson, Patricia Geenen, Mark Miller, George Bledsoe.

Call to Order

Congregational President Jane Cliff called the meeting to order at 12:50 p.m. The meeting was conducted in person with a Zoom option online. The meeting started with 58 in person and 30 online and quorum was achieved (59 people = 10% of eligible members). Total attendance peaked at 95. Closed captions were requested online, and the electronic version of the packet was shared in the chat.

Approval of Minutes, 2020 Annual Meeting

Motion to approve the minutes on page 12 of the Annual Meeting Packet by Mark Chambers. Seconded by Nick DaVia. Motion passed.

Remarks from the President (Jane Cliff)

Jane spoke about the “P’s” as different themes through the year. She referenced the rental apartment flooding and a boiler failure as unanticipated expenses. She emphasized that we adhered to our policies and operated within our budget. Participation numbers have been discouraging at times, but not as bad as they could be. Online has expanded our reach. Jane shared that the Board and our committees worked on gaining perspective, participating in anti-racism training in the spring. The Board is working to incorporate this into our work and governance. There were areas that weren’t perfect: youth engagement in the Board has proven too difficult with youth being “zoomed out”. The structural deficit issues continue, though last year’s congregational vote has been advancing an income generation strategy. Jane closed by thanking the congregation.

Nominating Committee Report (Kristine Hansen)

Nominating Committee looked at a variety of factors, including life experience and background of potential church members, working to better represent the congregation. For the board of trustees, there are three members they are nominating for a three-year term: Amy Wilbourne, Sarah Richards, and Joe Riepenhoff.

For the Nominating Committee, they are nominating two members for three-year terms: Anne Alexander and Jason Ludkte. As well, they are nominating Jessie Moffat to a partial term.

Motion to approve the slate of board nominees by Kit Vernon. Seconded by Dale Skaggs. Motion passed.

Motion to approve the slate of Nominating Committee nominees by Tristan Strelitzer. Seconded by Nick DaVia. Motion passed.

Financial Condition Report (Noreen Gilbertsen)

Noreen reviewed the completed Fiscal Year 2020-2021. Some highlights on income were very good pledge fulfillment, no Feast for Funds, interest rates on CDs, PPP loan forgiveness, and some issues with apartment vacancies. On expenses, both HR and total expenses were below budget (due to position vacancies), 14% in total. The year ended with income net operations at negative \$45,000, though a \$153,000 deficit had been budgeted. Expenses are lean and we need to focus on increasing income. Extraordinary income last year was incredible and uncommon.

Noreen went over the current year's finances (2021-2022). To date, pledges increased 3.7% over the previous year with 86% pledge fulfillment. We forecasted total income as \$822,000, budgeted at \$851,000. Interest rates on CDs went down and there were some unexpected apartment issues. Expenses are forecasted to be low by the end of year: \$958,000 (low by \$42,000). We are currently forecasting a deficit of \$136,000, having had a budgeted deficit of \$152,000.

Noreen also spoke to additional social investments being made. The question was asked around how we will sustain without the one-time investment from the Feds through PPP. The short answer is pledges.

Finally, Noreen shared next year's budget (2022-2023): The total budgeted income is \$841,000. Budgeted expenses increased 4% to \$1,042,000, with inflation expenses as well as ongoing concerns, such as the capital campaign. The budgeted deficit is -\$201,000, which is the largest budgeted deficit to date, that we're aware of. A question was asked about the scale of budgeted deficit and if the Board just felt it has to be done in anticipation to a capital campaign. A question was asked about programs being added, to which it was answered that they have not been added as much as these are our ongoing costs to continue.

Pledge Report (Mark Chambers)

Mark shared it was a good pledge year. As of the last count, there were 362 pledges on file totaling \$735,635. Before the end of the fiscal year, they are anticipating a total of 411 pledges and pledge income of \$727,730. Their goal with pledge drive was to move to sustainability, so revenues from pledge can cover operations. While this was not accomplished, they did see results in 40% of members increasing their pledges and 92% of members making a pledge. Gratitude was shared for the team of volunteers who supported the pledge this year.

Strategic Planning Team Update (Dave Becker)

Dave started by refreshing on the backdrop of last year's meeting and the groundwork leading up to this annual meeting. Namely, he spoke to the charge by the Board to their team, the consultant exploring growth and financial sustainability, the congregational vote to progress towards a plan to grow church income, and the focus on a special fundraising campaign. Since last year's meeting, they have continued planning and recruited co-chairs of the Special Fundraising Committee: Mark Chambers and Holly Patzer. They have also engaged with a consultant for a fundraising campaign: Klote and Associates, who center relationships in their work and campaigns.

This fall, in order to explore short and long term needs of the congregation, Special Fundraising Committee will hold small group sessions to help dream big and prioritize. A lot of questions asked had yet to be determined through the process of congregational engagement. They are anticipating the commitments will be fulfilled over a three year term.

A question had previously been asked about why the structural deficit was so big this year. Tom Briscoe, the Treas-

urer, mentioned that there would be unusual expenses with this campaign and that we will have to spend money to make money and we have budgeted that next year. Also, it was shared that the pledge drive will be combined at the same time as the capital campaign.

Remarks from the Minister of Religious Education (Rev. Kimberlee Tomczak Carlson)

Kimberlee shared about adaptation through the year. Throughout, we kept Religious Education (RE) going, in spite of COVID. Research shows that RE hasn't worked well overall through the pandemic and we are still feeling impacts of this, in spite of being back in person. This is a pattern across the country in congregations, both UU and otherwise. However, we see families keep coming in the doors, either returning or finding our community for the first time. We are back to being able to offer all ages RE again.

As a part of this, we are offering comprehensive sexual education for youth. There was more demand from beyond our congregation for the programming than what we could deliver. This is the only Our Whole Lives (OWL) training being offered this summer in the Midwest and will significantly expand our local capacity. We have the opportunity to rebuild RE and have been disrupted. We are planning for a full resume in the Fall.

Remarks from the Associate Minister (Rev. Dena McPhetres)

Dena has been reflecting on three questions: Where are we? Who are we? How are we? And that we are all collectively, and individually, grieving. The good news, she shared, is that church is designed for healing work. Dena invited us to take time to appreciate a variety of groups, including care workers, teachers, parents, pastoral care providers, small group facilitators. Finally, she invited us to listen to our own stories to help clarify where we are, who we are, and how we are.

Remarks from the Senior Minister (Rev. Jennifer Nordstrom)

Jennifer thanked the congregation for our congregational leadership, in all forms. She asked various leadership groups to rise to be recognized. She thanked all of them for their service. She contextualized the larger context of church: services and participation, a strong congregation in relation to the average across the country (UU or otherwise), both pledges and membership. Church is changing. Regular attendance doesn't mean 4x a month anymore. This also means we have more room for new people to join us. We want to welcome new people, to dream big, and fund those dreams to have more join our community.

Jennifer shared that next year, we'll still be in learning and repairing mode, mixed-mode meetings and rebuilding programs. We're going to relearn and rebuild together. We're currently doing twice as much work to execute in two modes. We're going to need more resources and the staff and leaders are helping us build a bridge to that new future. Our current pace of growth and learning isn't sustainable, so we need to learn how to do things differently and foster resources to do this.

Rev Jennifer also suggested that we'll have a lot of fun with the campaign and it is a sweet spot for our congregation. Jennifer spoke to her upcoming sabbatical in the spring for rest, renewal, study, and reflection. It will be a big year. It's a cultivation year, planting seeds and we'll see our big, beautiful dreams come together and flourish.

New Business (Comments from the Congregation)

A question was asked around the consideration of an eighth UU principle and if we can more routinely recognize our occupation of the land of first nations people. Rev. Kimberlee shared that every Sunday in RE they do a land acknowledgement.

In regards to an eighth principle, it is a multi-year process and goes beyond just a new principle. It is being modelled to explicitly commit the Unitarian Universalist Association (UUA) and congregations to anti-racism and anti-oppression ideals. Members are encouraged to attend the UUA General Assembly. Amended UUA by-laws will need to be voted on at two consecutive general assemblies, 2023 and 2024. Bruce Wiggins encouraged interested individuals to stay in touch with him and Jennifer in regard to denominational affairs work.

A question was asked about the creation of an accessibility committee. Dena shared that staff was working on an accessibility team prior to the pandemic and will revamp that effort for all those who experience issues with accessibility.

Another question was asked about the goal of our COVID policy and the role of personal choice. Rev Jennifer shared that the goal of the COVID policy is to reduce risk, both for our members and attendees, as well as reduce broader transmission and risks as much as possible. Our institutional stance is more about collective care than individual freedom, which is a different ethic than individual freedom. We continue to try to center what it means to live our faith as UUs and how is it reflected in the choices we make at this moment. Jennifer recognizes there is a cost to this. Also, she recognizes that that sacrifice means that some people who might be at risk or have family at risk have an ability to participate, who wouldn't otherwise.

A question was asked about the two services in-person, as well as online, and if we can aim to do that more efficiently. Jennifer shared the goal is to be livestreaming in the fall, because there are a lot of hurdles to get there.

Motion of adjournment by Tom Briscoe; second by Rod DePue. Motion passed. Adjourned at 3:10pm.

Additional Online Comments

There was appreciation for a multi-modal annual meeting and voting.

If meetings will be 90 minutes or longer, please include breaks for stretching, going to the restroom.

If only one service is streamed in the fall, please choose 11 am.

Hybrid meetings as an option for parents was appreciated.

Livestreaming with captions was expressed as being critical.

A reminder was made that fall services will be live streamed (not pre-recorded).

A comment was made requesting financial detail be provided in full detail further in advance of the annual meeting.

Adjournment

2022 - 2023 CHURCH LEADERSHIP

CONGREGATION OFFICERS

PRESIDENT
Benedict LeFort

VICE PRESIDENT
Pat Geenen

SECRETARY
George Bledsoe

TREASURER
Tom Briscoe

BOARD MEMBERS

George Bledsoe (2021-24)
Patricia Geenen (2021-24)
Rollie Hanson (2020-23)
Mike Hogan (2020-23)
Benedict LeFort (2020-23)
Tony Panciera (2021-24)
Sarah Richards (2022-25)
Joe Ripenhoff (2022-25)
Amy Wilbourne (2022-25)

NOMINATING COMMITTEE

Anne Alexander
Kristine Hansen, Co- Chair
Tom LeBel, Co-Chair
Jason Luedtke
Jessie Moffat
Susie Seidelman

TEAMS, MINISTRIES, AND GROUPS

ADULT SPIRITUAL DEVELOPMENT

Rev. Dena McPhetres

ANTI-RACISM TEAM

Rev. Jennifer Nordstrom

AUDIO

Nick DaVia
Alissa Rhode, Lead Music Dir.

BOOK DISCUSSION

Barbra Lancelot

BUDDHIST STUDY GROUP:
GATHERING WATERS SANGHA
Mark Miller

BUILDING & GROUNDS

Russ Drewry
Ken Liddell, Facilities Manager

CHANCEL CHOIR

Tristan Strelitzer, Choral Dir.

CHILDREN'S RELIGIOUS EDUCATION

Thea Watters
Stacey Theime
Rev. Kimberlee Tomczak Carlson

CHRONOLOGICALLY GIFTED

Pat McFarland
Barbara Collignon

COFFEE, CHRISTMAS

Lynne Jacoby, Membership & Dev't.

COMMITTEE ON MINISTRY

Luc Maker
Rev. Jennifer Nordstrom

DENOMINATIONAL AFFAIRS

Bruce Wiggins
Rev. Jennifer Nordstrom

ENDOWMENT FUND TASK FORCE

Dave Becker
Elizabeth Lentini

FEAST FOR FUNDS

Sue Thaney
Lynne Jacoby, Membership & Dev't.

FINANCE

Noreen Gilbertsen
Jean Johnson, Dir. of Admin.

FORGE OUR FUTURE CAMPAIGN

Mark Chambers
Holly Patzer
Rev. Jennifer Nordstrom

FORUM

Lorraine Jacobs
Mark Mueller

GALLERY

Alisha Koneazny

HABITAT FOR HUMANITY ADVISORS

Deb Solis, Youth Program Coord.

HERITAGE SOCIETY

Lisa Koneazny
Lynne Jacoby, Membership & Dev't.

HISTORY/ARCHIVES

Linda Presto
Jean Johnson, Dir. of Admin.

INFORMATION TECHNOLOGY (IT)

Allan Ries
Shari Wright, Office Manager

MEMBERSHIP

Lynn Connelly
Lynne Jacoby, Membership & Dev't

MORTER LECTURE

Rev. Jennifer Nordstrom

OWL TEACHERS

Deb Solis, Youth Program Coord.

PASTORAL CARE ASSOCIATES COORDINATOR

Jeri Percy
Rev. Dena McPhetres

PASTORAL CARE PROVIDERS COORDINATOR

Jane Dorweiler
Rev. Dena McPhetres

PERSONNEL

Nancy Spransy
Rev. Jennifer Nordstrom

PLEDGE DRIVE

Lynne Jacoby, Membership & Dev't

PULPIT GUEST

Rev. Dena McPhetres

SABBATICAL COMMITTEE

Eric Heilig

Rev. Jennifer Nordstrom & Rev. Jim Foti

SHAWL MINISTRY

Patti Agacki

Connie Georgenson

Rev. Dena McPhetres

SUNDAY FLOWERS

Shari Wright, Office Mgr.

SWANS (Seasoned Women Are Naturally Social)

Barbara Collignon

THEME CIRCLES

Rev. Dena McPhetres

UNITARIAN UNIVERSALISTS UNDER FORTY DOING ACTIVITIES (UUUFDA)

Angi Krueger

Erik Islo

USHERS

Cheri Briscoe

Lynne Jacoby, Membership & Dev't

UU PRINCIPLES IN THE 21ST CENTURY

Rollie Hanson

Michelle Boehm

Terry Wiggins

WORSHIP ASSOCIATES

Rev. Jennifer Nordstrom

FAITH-BASED PARTNER ORGANIZATIONS**CATHEDRAL CENTER**

Andy Sinko

COMMON GROUND

Jerry Fredrickson

GUEST HOUSE SHELTER

Elizabeth Lentini

INTERCHANGE FOOD PANTRY

Tim Ottman

Beth Bruch

INTERFAITH CONFERENCE OF GREATER MILWAUKEE

Patricia McFarland

MICAH (Milwaukee Inner-city Congregations Allied for Hope)

Pete Koneazny

Bob Monahan

SOCIAL JUSTICE COUNCIL

Rev. Jennifer Nordstrom

BLACK LIVES MATTER

Kenyatta Yamel

George Bledsoe

BLACK LIVES MATTER 2 WI UUs

Mary Devitt

CIRCLES OF SUPPORT

Paul Geenen

DEFEND DEMOCRACY

Kathy Rivera

Pete Koneazny

Pat McFarland

Dan O'Keefe

David Umhoefer

EARTH JUSTICE MINISTRY

Bruce Wiggins

Barbara Leigh

SHARE THE PLATE

Bob Monahan

Nancy Spransy

WUUSAN

Dan O'Keefe

OTHER LEADERS**THEME CIRCLE FACILITATORS:**

Rev. Dena McPhetres

Lisa Gies

Candice Haight

Erik Heilig

Diane Horne

Sally Lewis

Patricia McFarland

Nancy Spransy

Robert Szymanski

PASTORAL CARE ASSOCIATES:

Rev. Dena McPhetres

Bob and Sue Austin

Lynn Connolly

Deborah Conta

Jean Groshek

Joan Hansen

Melinda Vernon

Kitty Willkomm

2022-2023 Sermon Schedule

JUNE 5

"Centering Joy!"
The Rev. Jennifer Nordstrom

JUNE 12

"The Blessing of Pride"
The Rev. Jennifer Nordstrom

JUNE 19

"Sources of Our Wellspring"
The Rev. Dena McPhetres

JUNE 26

"Make the Time & Mark the Time"
The Rev. Dena McPhetres

JULY 3

"Knowing How to Play"
Annie Wegner LeFort, Member

JULY 10

"Different Types of Knowing"
The Rev. Dena McPhetres

JULY 17

"Living in the Gap"
Dale Skaggs, Member

JULY 24

"Do You Really Want to Know?"
The Rev. Dena McPhetres

JULY 31

"Journalism, You and the Future of Truth-Seeking"
Dave Umhoefer, Member

AUGUST 7

"Love in Community is Not a Hallmark Card"
The Rev. Dena McPhetres

AUGUST 14

"Living Through the Lens of Love"
Rev. Jen Crow

AUGUST 21

"Love and Boundaries"
The Rev. Jennifer Nordstrom

AUGUST 28

"Love That Saves"
The Rev. Kimberlee Tomczak Carlson

SEPTEMBER 4

"Finding Your Flock"
Amy Wilbourne, Member

SEPTEMBER 11

"Belonging in the World"
The Rev. Jennifer Nordstrom

SEPTEMBER 18

"Belonging in the Web of Life"
The Rev. Dena McPhetres

SEPTEMBER 25

"At Home in My Own Heart"
The Rev. Jennifer Nordstrom

OCTOBER 2

"Courage Is a Muscle"
The Rev. Jennifer Nordstrom

OCTOBER 9

"Real Democracy Takes Courage"
The Rev. Jennifer Nordstrom

OCTOBER 16

"Heroes Give Us Courage"
The Rev. Dena McPhetres

OCTOBER 23

"Courage Is Not a Solo Act"
The Rev. Jennifer Nordstrom

OCTOBER 30

"Courage and Death"
The Rev. Dena McPhetres

NOVEMBER 6

"Partner with God: Shape Change"
The Rev. Jennifer Nordstrom

NOVEMBER 13

"Responding to Change"
The Rev. Dena McPhetres

NOVEMBER 20

"There's A Song in My Soul"
The Rev. Jennifer Nordstrom
The Rev. Dena McPhetres
Rev. Kimberlee Tomczak Carlson

NOVEMBER 27

"Unbecoming"
Rev. Karen Armina

DECEMBER 4

"When Curiosity Is Better Than Knowing"
The Rev. Jennifer Nordstrom

DECEMBER 11

"Making Space for Wonder"
The Rev. Jennifer Nordstrom

DECEMBER 18

Holiday Pageant: The Solstice Badger
The Rev. Kimberlee Tomczak Carlson

DECEMBER 24

CHRISTMAS EVE CANDLELIGHT SERVICES
The Rev. Jennifer Nordstrom
The Rev. Dena McPhetres
The Rev. Kimberlee Tomczak Carlson

JANUARY 1

"First, We Let Go"
The Rev. Dena McPhetres

JANUARY 8

"How Do You Find Your Center?"
The Rev. Jennifer Nordstrom

JANUARY 15

"Widening the Circle, Centering the Margins"
The Rev. Jennifer Nordstrom

JANUARY 22

"Returning to Center Together"
The Rev. Jennifer Nordstrom

JANUARY 29

"Waiting for Jesus and Superman"
Beth Monhollen, Member

2022-2023 Sermon Schedule

FEBRUARY 5

"Love Is the Ground of Growth"
The Rev. Jennifer Nordstrom

FEBRUARY 12

"Love Is a Gateway Drug"
The Rev. Jennifer Nordstrom

FEBRUARY 19

"Resurrecting Love"
The Rev. Dena McPhetres

FEBRUARY 26

"Love Makes Us Brave"
The Rev. Jim Foti

MARCH 5

Annual Youth Service
"Hold Space for Vulnerability"
The Rev. Kimberlee Tomczak Carlson

MARCH 12

"Asking For a Friend"
The Rev. Dena McPhetres

MARCH 19

"Putting Yourself Out There"
The Rev. Jim Foti

MARCH 26

"Stuck In the Middle with You"
The Rev. Shari Halliday-Quan

APRIL 2

"Who Do You Say That I Am?"
The Rev. Dena McPhetres

APRIL 9

"Jesus Resists!"
The Rev. Dena McPhetres

APRIL 16

"Resisting Tyranny"
The Rev. Jim Foti

APRIL 24

"Finding Hope in a Climate Crisis"
Marisa Riepenhoff, Member

APRIL 30

"Every Body Is Sacred"
The Rev. Ashley Horan

MAY 7

"Adventures of a Hindu
Unitarian Universalist"
Rev. Manish Mishra-Marzetti

MAY 14

"Theories of Generativity"
The Rev. Jim Foti

MAY 21

"Faith Formation Celebration-RE Sunday"
The Rev. Kimberlee Tomczak Carlson

MAY 28

"Love at the Center"
Rev. Hanna Roberts Villnave

JUNE 5

"Flower Ceremony: A Special Kind of
Happiness"
The Rev. Dena McPhetres
The Rev. Kimberlee Tomczak Carlson

Wheel of Life

May 10, 2022 - May 14, 2023

Deaths

Franklin Evans
Camille Johnson
Beverly Jean Katter
Gerald "Gerry" McDonald
Robert "Pete" Petrie, Jr.
Donald Polzin
Larry Gale Salisbury

Dedication of Parents And Children November 20, 2022

Liam James Diliberti
Child of Jessie & Gina Diliberti

Caroline Rose Jarczynski Monacelli
Children of Crysta Jarczynski & Teddy Monacelli

Graham Moniz & Clark Moniz
Children of Ashley Moniz & Taylor Moniz

Vivian Panciera
Child of Tony & Amanda Panciera

Josephine Charlie DeBoer
Child of Amanda DeBoer & Andrew Boddyspargo

Dedication of Parents And Children May 14, 2023

Jasper Murray-Bentz & Skylar Murray-Bentz
Children of Jen Murray & Meighan Bentz

Elsie Pischke-Maxwell
Child of Justin & Jose Pischke

Adela Zaiger & Cecille Zaiger
Children of Adam & Jessica Zaiger

Weddings

Katie Josephine Sorg and Alexander Jon Becker
Saturday, May 21, 2022 at
First Unitarian Society of Milwaukee
Rev. Dena McPhetres, officiating

New Members

Fall 2022

Anna Buesing
Kathy Herbst
Jan Jahnke
Erin Lindsay
Thomas McGovern
Samantha Ramsey
Sam Westcott

Winter 2023

Brian Bishop
David Hoover
Andrew Smith
Megan Smith
Lynde Uihlein
Adam Zaiger
Jessica Zaiger

Spring 2023

Marc Anewenter
Meighan Bentz
Karen Block
Kristina Dayton
Jerry Hershberger
Pat Hidson
Kathi Hillyer
Todd Marsh
Angie Mason

Carley Mostar
Jen Murray
Nick Rummeler
Wendy Sheridan
Ben Trubach
Pammela Wright
Val Wright

Wheel of Life

May 10, 2022 - May 14, 2023

Heritage Society

Keith & Paula Anderson
JoAnn Bachar
Bob Balderson
Christian Becker & Christina
Zawadiwsky-Becker
Mark & Jo Ann Bishop
Patricia McFarland &
Nick Bokas
Rod Botts
Tom & Cheri Briscoe
Paul & Susanne Carter
Dennis & Deborah Conta
Susan Comstock
Alexis Fielek
Mary Ann Fisher
Jerry Fredrickson & Jill Erickson
Scot Henry & Laura White

Sally Heuer & Steven Culver
Mary Houseman
Nelson Kading
Drew Kennedy & Lois Wesener
Tina Keppel
Pete & Lisa Koneazny
Hank Kulesza
Loren Leys & Adele Kaferly
Bob Moore & Liz Irwin Moore
Mark & Lonni Mueller
Ellyn & Mike Newman
Marlowe & Janet Nortrom
Mimi Notestein
Patrick & Barbara Patterson
Holly Patzer
Kathy & Bob Porter
Linda Presto

Tom Radoszewski
Michael Radtke
Miriam Reading
Kathy Rivera & Sally Lewis
Max & Patricia Scharmach
Dale Skaggs & Lynda Lambert
Dick & Nancy Spransy
Jane Stoltz
Eileen Teska
Melinda & Kit Vernon
Don Weimer & Chris Linder
Bruce & Terry Wiggins
Jacki Zandi

Staff Reports

MINISTRY

SENIOR MINISTER

The 2022-23 church year has been powerful and transformative in the life of our congregation, and all of us have been a part of it. In the fall of this year, we worked together to raise a pledged total (as of Feb 5, 2023) of \$2,724,303 for our principle-protected, annual income-generating Forge Our Future Fund! The congregation came together under Holly Patzer and Mark Chambers' tireless, grounded, and playful leadership, and everyone pitched in. Our Forge Our Future Campaign Steering Committee made more than 250 visits with First Church households, and you all had powerful, generative conversations about what matters to you and your hopes for our future together. You are amazing! You bring me such hope not just for church, but for the world. Thank you to the entire congregation, the staff, the Steering Committee, and especially our Steering Committee Co-Chairs, Mark and Holly. Our community has solid and sustainable financial footing because of your hard work, your dedication, and your incredible generosity.

As you read this, I am on sabbatical, taking some much-needed time to refill the spiritual well so I can come back to you in August energized and ready for our next chapter together. The Senior Minister Sabbatical Team is at the helm, supporting our exciting pulpit guest line-up, including a number of leading Unitarian Universalist authors, theologians, and social justice leaders. Many thanks to that team, as well as our entire staff, especially Rev. Dena McPhetres, Jean Johnson, and Rev. Kimberlee Tomczak Carlson, as well as our Assistant Sabbatical Minister Rev. Jim Foti, for taking on pieces of my regular work while I am away. I am confident you all are having a wonderful time together, learning new things, and experimenting with new ways of being while I am away. I look forward to returning to you in August and discovering all you have learned, and sharing stories of my sabbatical!

With love and so much gratitude,
Rev. Jennifer

ASSOCIATE MINISTER

What a beautiful, awkward, and joyful year it has been as we complete our first full church year back in-person at our 1892 church building since the spring of 2019! Beautiful to behold each other's three-dimensional beings. Awkward to remember our social skills, each other's names, and re-learn what is most important to our congregation's identity. Joyful to welcome a robust stream of visitors, long-time members, new members, babies, toddlers, children and youth into our midst.

e.e. cummings wrote, "i thank You God for most this amazing day: for the leaping greenly spirits of trees and a blue true dream of sky; and for everything which is natural which is infinite which is yes"

Gratitude is the primary response to the life flowing through our community--even when it felt like a trickle at the beginning, when we didn't "fill" the sanctuary, when we got impatient with masking, when we couldn't sing safely yet, when and when and when. And then, the trickle grew into a stream, a river, a strong current flowing through our blood, our voices, our hearts and spirits. We grew to more fullness in the sanctuary, we could remove masks by choice, and we sang and sang and sang our way to yes.

ADMINISTRATION

I began serving as Head of Staff upon our Senior Minister's departure for sabbatical in mid-February, directly supervising 5 staff members, leading the executive staff team, and onboarding our delightful and skilled Assistant Sabbatical Minister, Rev. Jim Foti. My other sabbatical coverage included leading the Worship Staff Team, the Worship Associate Retreats, recruiting the next cohort of Worship Associates, and training the Sabbatical Team to coordinate pulpit guests. While planning for Rev. Jennifer's sabbatical, we divided her responsibilities into four staff members (Rev. Kimberlee, Rev. Jim, Jean Johnson

Staff Reports

and me). Lay leaders took on more, too. Any success during sabbatical is due to our strong and skilled staff team and our enthusiastic and competent lay leaders. It is definitely a team sport! I also enjoyed making 15 personal visits during the Forge Our Future campaign in fall and winter and am so proud of all our congregation accomplished to invest in our future.

ADULT SPIRITUAL DEVELOPMENT

Adult Spiritual Development (ASD) continued to offer opportunities for spiritual growth and learning, thanks to our many facilitators! Groups included in-person, online, and multi-platform options.

Connect & Reflect group had 6-8 participants weekly. Diane Horne facilitated.

Geography of Grace group had 7 participants monthly. Amy Wilbourne and Diane Horne co-facilitated.

Poetry Contemplation group has 22 people on their list with average attendance 12 participants weekly. Lynne Jacoby and her team facilitated. Lynne added a second group this year with average attendance 5 people meeting twice a month.

UU Wellspring "Sources" group, in its second year, met twice a month with 4 participants, facilitated by Diane Horne. Participants took a deep dive into the six UU sources of wisdom--committing to a daily spiritual practice, doing homework, and reflecting together on UU history, theology, identity, and their own spiritual growth.

Theme Circles completed its fifth year at First Church, where members and friends gather in groups of eight with a trained facilitator to delve deeper into our monthly worship themes. Theme Circles include homework with spiritual exercises, questions for reflection, and multi-sensory resources, which can be done at your convenience at any level. Participants make a commitment to attend once a month October – June. Theme Circles served 48 members and friends, plus 9 Facilitators in 7 circles this year. One new facilitator joined our team. Registration for next year begins September 1.

Theme Circle Facilitators worked on incorporating an anti-racism, anti-oppression element into the circles' covenants,

called 'holy interruptions.' This relational agreement comes from the Beloved Conversations curriculum and is an established part of UU Wellspring.

Yoga classes with teacher Morgan Engels returned to in-person sessions and served 9 students once a week in the fall, then went on hiatus in the winter due to a life change for our beloved yoga teacher. Morgan taught yoga at First Church for over ten years!

We hope to offer more opportunities for Adult Spiritual Development next church year as staff, lay leaders, and congregants recover from pandemic fatigue.

PASTORAL CARE

Someone once said, "grief shared is halved, joy shared is doubled." We continued to lighten each other's burdens and increase each other's joy as our community came back together in-person. The support we give and receive from each other, both formal and informal, makes a world of difference to our well-being.

Our team of eight Pastoral Care Associates (PCAs), with the help of Co-Trainers Sarah Richards and Dale Skaggs, and PCA Coordinator Jeri Pearcy, continue to offer a confidential listening presence to members who face significant life events including illness, accidents, surgeries, death of a loved one, separation and divorce, parenting challenges, hospice, homebound elders and the stress of caregiving, among other life transitions. PCAs made multiple contacts with 34 members since last May. Rev. Jennifer, Rev. Kimberlee and I made at least 106 pastoral care contacts with members.

We continued offering votive candles for people to light before worship services in the sanctuary to honor their sorrows and hopes as our community regathered. We delivered 15 shawls, lap robes and baby blankets from our Shawl Ministry. Our online, drop-in, monthly Grief Support Group continued through April, co-facilitated by me and PCA Deborah Conta. Average participation ranged from 1 – 4 people; when attendance significantly declined, we put the group on hiatus after serving members and guests for 16 months.

Our Pastoral Care Provider (PCP) Team of church members

Staff Reports

provide practical help for short term needs. We worked on rebuilding this team since our community re-gathered in person. Four PCPs responded to requests during the past year. We provided multiple meals to six households. We had one request for rides, which was filled by members of The Chronologically Gifted group. We were delighted to welcome Liz Irwin Moore as our new PCP Coordinator beginning August 2022. Much gratitude to Jane Dorweiler who served as Coordinator for over 3 years.

SMALL GROUPS

Four Affinity Groups were active through a variety of online, in-person, and multi-platform options including Book Discussion, Gathering Waters Sangha (Buddhist Study Group), Chancel Choir, and The Chronologically Gifted. These Member-Led Ministries gather around shared interests or demographics to find friends and deeper belonging. Affinity Groups are open to everyone to come and go as they please. We hope to resurrect the UUUFDA (UUs Under Forty Doing Activities) Group for the coming church year!

SUMMER SERVICES

Summer worship services and religious education programs continue to be an important ministry of year-round church. I work closely with the Pulpit Guest staff-led team to plan and coordinate summer services. I also provide one-to-one coaching for each member who leads a service. We held 13 summer services in 2022, including 8 services led by First Church ministers, 1 guest minister, and 4 member-led services.

DENOMINATIONAL AFFAIRS

I served as Co-Convener of our UU Ministers SE Wisconsin group and I continue to serve as Good Officer for our UU Ministers Chapter.

WORSHIP

Our cumulative average In-Person worship attendance covering from Ingathering Sunday, September 11, 2022 to April 30, 2023 was 164 people. This total average includes both 9:00 a.m. and 11:00 a.m. services. In the Fall, we averaged in the 70s at each of the services, and by winter we averaged in the 80s at each of the services.

Our Online participants in worship who viewed the service live at 9:00 a.m., during our livestream, ranged from 22 – 40 viewers. When we tally total live online views plus views of the recorded service that occur throughout the day and evening on Sunday, we range from 64 – 164 views.

It is clear by these numbers that we have robust participation in our online worship services, and we are grateful for the folks who worked hard to bring livestream technology to our sanctuary this church year and we thank the volunteers who sit at the table at the back of the sanctuary and make the livestream happen every Sunday!

Although our sanctuary feels more lightly populated than before the pandemic, we must remember that if we combine attendance between in-person and online views, our attendance is larger than we think. For example, on Ingathering Sunday Sept. 11, 2022, we had a total of 165 people attending In-Person and 97 “unique views” of our online service throughout that Sunday. This makes a total attendance of 262 on Ingathering. On Easter Sunday, April 9, 2023, we had a total of 196 people attending In-Person and 127 “unique views” of our online service throughout the day on that Sunday. This makes a total attendance of 323 on Easter.

We are slowly and successfully building back our church!

CONCLUSION

A palpable energy is flowing through our communal life again. People are popping up with desire for fun and cherished activities like Circle Suppers, Art Gallery, Feast for Funds, and Church Picnic, as well as new endeavors like building an Accessibility Team. May we continue to sense and welcome the energy among us, open our doors and hearts wider, and nourish the spirit of gratitude and joy. “(now the ears of my ears awake and now the eyes of my eyes are opened)”

Thank you for showing up. Thank you for holding space for all that life brings. Thank you for the honor of serving First Church.

Yours,

Dena

Staff Reports

ASSISTANT SABBATICAL MINISTER

Arriving to help serve a large congregation in the middle of a church year was like parachuting onto a fast-moving train – daunting, but exciting. Fortunately, I landed with some basic knowledge of both the church and Milwaukee, as I was a member here in the early 1990s and grew up in the area. More fortunately, First Church, its ministry team, and its staff are extremely organized and were able to provide a wealth of information for navigating the congregation's many programs and systems. In this quarter-time position, my focus areas have been helping with worship planning and logistics for our pulpit guests, leading worship/ preaching once a month, and serving as the staff contact for the Social Justice Council, Denominational Affairs, and the Sabbatical Team. I continue to be inspired by and grateful for the high level of competence and morale on the staff; the friendliness, enthusiasm, and wisdom of the congregants; and the pervasive sense of health throughout the congregational system, something that's all the more remarkable after the trauma and disruption of the pandemic. You have something very special here, and you work hard and joyfully to keep it thriving. It is a great blessing to serve you.

SOCIAL JUSTICE COUNCIL

This year, our Social Justice Council focused on keeping successful programs thriving and exploring ways to increase participation as in-person church continued and Sunday attendance grew. As is common in congregations, there were ebbs and flows in various programs, as volunteers moved in and out of leadership. The question of engagement remains an active one, as the council considers differences in the way church members utilize communication and approach justice work, and the council has engaged visiting minister the Rev. Jim Foti to offer ideas. Overall, the congregation and its many dedicated volunteers continue to offer a range of robust opportunities for advocacy and direct service through the church's own groups and its rich partnerships in the community.

Some highlights from individual teams on the Council:

- The Interfaith Council of Greater Milwaukee resumed its annual March luncheon series at First Church. This year's theme was "Democracy in Peril," with Rev. Jim

Foti offering a welcome. Attendance was very solid.

- The Earth Justice Ministry brought people together to enjoy nature for Walk and Roll events at Three Bridges Park in the Menomonee Valley.
- The Circles of Support team continued to meet with citizens returning to Milwaukee after being incarcerated, and listened to their stories.
- Members of the Defending Democracy team took an active role in helping register voters for the Fall 2022 election.

More details from social justice teams can be found in the Member-Led Ministries section of the annual report.

SABBATICAL TEAM

The Sabbatical Team had a busy and productive year all the way through. Prior to the start of Rev. Jennifer's sabbatical, the team helped prepare the congregation, both logistically and mentally, for the reality that their Senior Minister would be away for five months. Realizing that communication was the key, Rev. Jennifer and the team offered a Q&A on the website, an in-person meeting on a Sunday, and other information that helped reduce anxiety and increase enthusiasm for the sabbatical. Then, as the sabbatical began, the team shifted gears and began to help with planning and communication with our sabbatical pulpit guests, who hail from different parts of the country and represent a range of backgrounds. This was a dramatic change from the team's earlier role and brought learnings about worship planning and church communication deadlines. Eric Heilig has been a skillful chair of the team, and Rev. Jim Foti has been a helpful resource as we welcome our notable speakers:

March 26: Rev. Shari Halliday-Quan, Senior Minister, First Unitarian Church of Rochester, NY

April 2: Rev. Dr. Sofia Betancourt, Unitarian Universalist Association (postponed due to health concern)

April 23: Marisa Riepenhoff (FUSM member) & Matt Meyer (musical guest)

April 30: Rev. Ashley Horan, Organizing Strategy Director for the UUA

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May 7: Rev. Manish Mishra-Marzetti, Senior Minister, First UU Congregation of Ann Arbor, MI

May 28: Rev. Hannah Roberts Villnave, Fox Valley UU Fellowship in Appleton, WI

June 11: Rev. Tony Larsen, Unitarian Church North in Mequon, WI

DENOMINATIONAL AFFAIRS

The Unitarian Universalist Association (UUA) General Assembly (GA) in June 2022 was held in Portland, Oregon, and First Church was represented by several members who attended in person and online. GA 2023 is scheduled online and live in Pittsburgh, PA. For both, FUSM had a delegation but we did not fill our allotment of delegates.

A significant focus of the current church year has been the revisions to Article 2 of the UUA bylaws, something our congregation had prepared for during the previous church year with a small Article 2 Team formed to publicize proposals and hold workshops that gathered input from our members. The proposed revisions, made public in January, include a shift from the Principles as we've known them to a focus on six values centered on love – interdependence, justice, equity, pluralism, generosity, and transformation – with an additional emphasis on inclusion, sources of inspiration, and freedom of belief. A February worship service led by Rev. Jennifer was dedicated to the Article 2 changes, with members of the Article 2 team on hand to answer questions. Also, the annual youth service helped the congregation envision living these values. The Article 2 team, the Board of Trustees, the Anti-Racism Team, and the Social Justice Council have been among the groups discussing and reflecting on the proposal and encouraging its adoption. The Article 2 revisions will be taken up at this year's General Assembly, being held in June in Pittsburgh. At least three church members and two ministers are planning to attend GA in person, with more members attending online, and First Church is offering financial assistance to delegates to encourage participation. For the first time in the memory of current membership, our Board of Trustees passed resolutions encouraging our GA delegates support a particular item of business, in this case, the proposed bylaw changes.

ADMINISTRATION

DIRECTOR OF ADMINISTRATION

Reporting to the Senior Minister, I am responsible for overall administrative functions of the church including financial management, human resources administration, communications, and facilities management. I manage these areas with a combination of talented staff, expert volunteers, and contract services. I supervise our wonderful Office Manager, Facilities Manager, and Facilities Assistant as needed. As the church's administrator since 1998, I have a long and broad overview of church operations. Here are some highlights of the year.

OFFICE/ADMIN HIGHLIGHTS

Office Manager Shari Wright is responsible for general operations of the office so that it functions efficiently and smoothly. In addition to general office and admin processes, her responsibilities include technology integration, events planning, IT and database management, contributions accounts and data, and along with our Communications Team, publications and communications. I'd like to thank Shari for her outstanding dedication to the church and our work while she has been undergoing cancer treatment this year.

The communications team currently includes Office Manager Shari Wright and me. Digital Outreach Coordinator Molly Sommerhalder left our employment for fulltime work June 2022, and the position will not be filled due to financial constraints. Using a variety of channels, the comm team worked to keep folks engaged in programs as they returned to in-person. We focused strongly on the Forge Our Future campaign and Jennifer's sabbatical. Without social media staff, as well as other admin staffing issues, digital outreach fell back to focus on Forge Our Future and basic posting about Sunday services and Forum. Some staff have increased their social media posts.

I'm a member of the COVID Team, focusing on implementation of policy and precautions as well as communication. I'm happy that we've been able to lift all restrictions this year.

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FORGE OUR FUTURE CAMPAIGN

The admin team supported this extraordinary fundraising campaign's various admin requests. We welcomed to our office with tech and admin support, fundraising consultant Rev. Glenn Wagner. Shari provided data, kept pledge records reconciled and coordinated with Glenn. I gathered a small communications team of Michelle Boehm for overall strategy with some copy-writing, Jason Ludtke did weekly social media, and I did overall coordination, ebasts, letters, etc. We supported a dozen focus group meetings (in-person and on Zoom) in August and the amazing kickoff street party in October. It was a pleasure to work with Glenn. Special thanks to all of you who participated in this enduring effort.

SABBATICAL

Communication about sabbatical was critical: both informing the congregation about why sabbatical for ministers and how we'd manage in Jennifer's absence, as well as building excitement about the amazing pulpit guests who have visited us during the sabbatical. I was asked to take on Jennifer's responsibility of working with the Board of Trustees. Although this is a considerable extra duty, it's been a joy to work with the Board. I also supported Lynne Jacoby to complete the mini-annual pledge drive this spring.

LIVESTREAMING SUNDAY SERVICE

With the leadership of Rev. Jennifer and Shari Wright, a project team formed summer of 2022 with the goal of livestreaming entire Sunday services from the Sanctuary. The team included music staff

Tristan Strelitzer and Alissa Rhode with church members Steve Culver, Eric Berndt, Nick DaVia, and Charles Woodward.

The team installed additional livestream equipment including a second camera for views from the side of the Sanctuary. The team conducted several tests of the audio and camera settings and determined how best to livestream the service with its different elements. September 11, 2022, the entire service, including music, was livestreamed to YouTube.

Every Sunday since September 11, we have successfully

livestreamed 9:00 a.m. service on our YouTube Channel. The First Unitarian Society of Milwaukee YouTube Channel has 817 subscribers. Since September, an average of 33 views (on a device such as a computer connected to YouTube) watch the live 9:00 a.m. service. By the end of the day on Sunday, an average of 105 viewers watch the service. Sunday service videos are saved on YouTube for a month. We appreciate the team who operates the audio and cameras: Nick DaVia, Eric Berndt, Eric Heilig, Mark Miller, and Austin Baldwin.

INFORMATION TECHNOLOGY

The IT team is led by Office Manager Shari Wright and the members are Steve Culver and Allan Ries. Summer of 2022, the IT team upgraded old network equipment including our Internet firewall security server. The church contracted with TSR Solutions to manage this server and support our network and staff computer needs. The security managed by TSR Solutions will be updated and is very reliable for the church network.

This past year, the network was very stable and the network Internet bandwidth meets our needs for church operations including the livestream service. The staff are working with our new MS Office 365 workplace and developing the SharePoint sites to work with external church members. There are 15 active SharePoint sites and currently 46 church leaders have guest accounts to work with their team on our SharePoint sites. Additionally, several church members connect to a folder or files on our SharePoint sites.

The IT Team meets monthly and is working on phone system issues, improving our door camera security server, and will be retiring old servers that we don't need this upcoming year.

FACILITIES HIGHLIGHTS

Facilities Manager Ken Liddell (and Tom Schroeder before him), on a part-time basis, is responsible for managing building use and directing our friendly and capable Facilities & Technical Assistant Jim Spice. Ken manages repairs and improvements of our facilities with the assistance of a very part-time Maintenance Worker and the talented Building and Grounds Staff-led Team, headed by Russ Drewry.

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Tragically, in June 2022, Tom Schroeder became very ill and passed away in early July. The facilities manager position was vacant until late October; I took over these responsibilities in this interim. We are very fortunate to have found a wonderful match for our church in our new facilities manager Ken Liddell. I enjoy helping Ken learn about our wonderful buildings.

Ken and the B&G Team have done a great job managing numerous projects this year. Highlight include: replaced boiler circulating pump which supports the Sanctuary, replaced a fan belt on a rooftop air handling unit, continued investigating Sanctuary air exchange rate and other methods to clean interior air, fixed plaster and painted certain walls and ceiling in Max Otto Hall, Stevenson Parlor, Sanctuary balcony, and various basement areas. They also completed the Facilities Condition Survey which is updated every five years.

FINANCE OPERATIONS HIGHLIGHTS

Financial systems operated smoothly this year. Working with Shari and our accountant, I provide accurate monthly financial statements and pledge fulfillment reports. Working with the Finance Team, we provide quarterly reports to the Board of Trustees. I also lead the development of the annual budget. We keep a close eye on our primary income source, contributions; pledge payments have been strong all year. This fall we implemented our bank's systems for security of check payments and ACH payments. Please also find a report from Finance Team chair Noreen Gilbertsen in this report.

Forge Our Future Endowment pledge payments have been steadily coming in (over \$700,000 as of the date of my writing). The Finance Team established a money market account exclusively for holding these contributions until the formal endowment investment fund is created by the Endowment Fund Task Force. I developed a process for transferring these special contributions each month after reconciliation with database records.

This year, as every year, has been filled with new challenges and joys. It's been wonderful to see folks returning to our church building, as well as new folks finding us for the first time. Our connection as a church community is pre-

cious, essential, and strong. I'm honored to serve First Church.

Jean Johnson

Director of Administration

MUSIC

LEAD MUSIC DIRECTOR

SUNDAY SERVICES

Lead Music Director Alissa Rhode and Choral Director Tristan Strelitzer continue to strive for Sunday programming that inspires wonder and transformative experience in a communal setting, while simultaneously seeking to provide a full spectrum of musical styles designed to engage and welcome a diverse range of people and perspectives. Collaborative Pianist Teresa Drews continues to contribute her artistry through piano solos and accompanying the Chancel Choir. With the loosening of protocols in 2023, we were once again able to complement our staff and member musicians with occasional featured guest musicians.

AUDIO

Lead Music Director Alissa Rhode has continued to train and coordinate our Audio Team members, who rotate the duty of mixing in-room sound during Sunday services. As we embarked upon livestreaming from the Sanctuary this church year, Audio became a larger portion of our Music staff's work. The music director on deck for each Sunday now creates the sound design, or "scene," and communicates with the Audio team member regarding what to anticipate when mixing in-room sound for that particular Sunday. The music director also routes a secondary sound mix for the livestream and communicates/coordinates with the Livestream Operator regarding what to anticipate when mixing for the stream. Since our music is quite different each week, the blessings of variety in our music program can pose significant challenges on the audio end of livestreaming; however we continue to learn and fine tune our best practices. Both our in-room Audio and Livestream operators continue to provide thoughtful and careful atten-

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tion to the task. We are extremely grateful to them for this important and valuable service.

CHANCEL CHOIR

The Chancel Choir rehearsed indoors for the entire church year and remained masked for many months. We are grateful for the patience of the choir as we continued to center the most vulnerable and gradually transitioned to more relaxed protocols.

CHORAL SCHOLARS

We have had at least one choral scholar participate in Chancel Choir for most of this church year. As Krug funding for this program is not entirely exhausted, we will seek to fund Choral Scholars in the coming church year until the remaining funds run out, most likely at the end of 2024.

SINGERS IN THE STREETS

This project remained on hold during 2022-23; however, we hope to pick up and continue the work in the coming church year.

Alissa Rhode
Lead Music Director

RELIGIOUS EDUCATION

MINISTER OF RELIGIOUS EDUCATION

This year marks the first full year of in-person religious education classes since 2018-19. We have come a long way this year in rebuilding our ministry with children, youth and families, and continue to grow each week. At the beginning of this year, late summer, and early fall of 2022, R.E. volunteers' recruitment was extremely challenging, and I was concerned we would not be able to run the program we had planned or be able to train RE volunteers. Fortunately, professional teachers and former RE teachers in our community agreed to offer their time and expertise. Their commitment to the program this year allowed the RE program to return and begin to rebuild.

Therefore, I am especially grateful to all our lead teachers this year: Caroline Robbins, Stacey Thieme, Connie Craig, Angela Brist, Thea Watters and Desiree Pointer Mace. These teachers were assisted by many volunteers who gave their time on Sunday to assist in the classrooms, nursery, pre-school and all-ages programs, providing a caring and compassionate presence to our children. Together we navigated new sign-in procedures and programs, required masking to optional masking, learned about each other as we explored our faith and had fun together!

Mariah Groshek returned to leading and crafting our pre-school lessons this year using Soul Matters resources. We were fortunate to hire Cecelia Groshek to manage and offer care in our nursery. Many improvements have been made to our nursery and pre-school classrooms, including a clean out of out-of-date toys and furniture, adding a new working swing, playmat, wall repair and a monthly cleaning schedule. I also worked to enhance our children's area in the Leenhouts common room to provide a welcoming environment for our younger children and their families, adding a playmat, toys and new table.

This year I used multiple sources to provide lessons for our 1-2nd graders and adapted Hogwarts UU for our 3-5th graders. In March, we changed our Hogwarts UU class to Magic & Mystery due to the transphobic behavior of J.K. Rowling. I lead our 6-8th class in Crossing Paths, an interfaith journey, until January when we combined the middle school and youth group due to low attendance.

This year I joined the Executive Team of the church which helps center and prioritize the ministry to children, youth, and families at First Church. Additionally, we increased our three ministers meeting to twice a month to better communicate and coordinate the work of the church across all ages and I was added to the pastoral emergency line rotation.

We struggled this year to hire and maintain personnel in our part-time R.E. Assistant position. Julie Harris served in the position from August to early November and Quinn Brakob served from December to April. Julie and Quinn were both good additions to our R.E. team, and both left for full-time work. These transitions have been a signifi-

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cant strain of time and energy throughout the church year.

Additional initiatives of our religious education team include sending caring Valentines to members, maintaining check-in attendance system for children and youth, the faith formation room and worship activity bags, offering Time for All Ages in Worship during Sunday services, tracking new children in our congregation, (from baby blanket to child dedications), welcoming new families, creating the R.E. Weekly Update and scheduling RE volunteers each week.

It was reassuring and hopeful to witness the steady growth of our R.E. attendance and registration throughout the year, as families returned, and many new families began to participate in our R.E. programs.

Looking to our future, I believe that the new model of faith formation that the C.R.E. team has worked to develop for our children, youth, and families will help us continue to welcome all kinds of families adding to our faith community. Our goal is to create a sustainable faith formation program, one that centers the needs of our children, youth, and families, utilizes our resources wisely and is formed around the unique experiences that First Church can offer. We plan to launch a new model of religious education in the fall of 2023 using a variety of options such as: multi-generational worship, makerspace, rotational workshops, and choice models.

In faith,
Kimberlee

CHILDREN, YOUTH AND FAMILY RE TEAM

Vision: Rooted in the church's mission, we envision a church community modeling and teaching children and youth to embrace a strong core of Unitarian Universalist (UU) values, influencing their way of being in the world while serving the needs of our world.

Mission: Children's Religious Education Ministry Team's mission is to nurture spiritual growth by engaging and inspiring our children, youth, and volunteers. ~Rev. 2017-18 2020-21

Goal: Children's Religious Education Team's 2020 goal is to openly explore innovative ideas that welcome and

connect families.

The Children's Religious Education Team met monthly throughout this year to plan and work together in creating events and programming for RE. The CRE team has been instrumental in creating many of the special events this year as well as teaching RE classes as needed. Our CRE team includes co-chairs Thea Watters and Stacey Theime, Stacey Koenen, and Caroline Robbins. This team has been the volunteer backbone of our RE program throughout the pandemic, restarting the RE program in person and visioning how the program needs to transform to better serve our children, youth and families. I am grateful for their belief and dedication to continuing religious education and their support as we worked to transform the way faith formation is offered in the future.

2022-23 Church Year Highlights in R.E.

The R.E. program contributed to and offered these special programs and events this year: two Our Whole Lives facilitator trainings, family activities at the Forge the Future Block Party, Jingle Bus Ride, Mystery Friends pen pal exchange and party, Holiday Giving Tree, Guest House Dinner, Magic & Mystery Party, visit to ZAO MKE, Jewish Museum and Congregation Beth Israel Ner Tamid and R.E. democracy lessons with the help of Pam Wilkie, Sally Lewis and Patrick Mulvey.

I led multiple All Ages RE Together this year including, Ingathering Water Communion, Easter Celebration and Earth Day where we learned about ritual, science, Native People of Wisconsin, and religion through story, song, games and artmaking. I worked with Revs. Jennifer and Dena to shape our multi-generational Sunday services on October 30 called: Courage and Death. I coordinated and helped create a music and dance filled multigenerational service on November 20, called There's A Song In My Soul that featured music from our talented band, the expertise of Alissa Rhode and stories from Ryan Pawlowski and Jon Fitak. Our Holiday Pageant featured an adaptation of the Solstice Badger, that featured our choir, Tristan Sterilizer, and cast: Max Larson, Vera LeFort, Nolan Watters, Kailey Thieme and Myles Pointer-Mace as well as our walk on animal participants for creating a fun, educational and joy filled service for our congregation. I

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also worked with the Youth Group to shape Youth Service and am currently involved in developing the RE Sunday Service.

Children and Youth RE Metrics

2022-23	2021-22	2020-21	2019-20	Comparisons taken on average through the 2nd Sunday of March
48/14	48	31	118	Number of registered children and youth: member/non-Member
32	10 online 16 in-person	21	56	Average Sunday RE Program Attendance, not including MG Services.

Rev. Kimberlee Tomczak Carlson
Minister of Religious Education

YOUTH PROGRAM COORDINATOR

The Youth Program Coordinator (YPC) reports directly to the Minister of Religious Education (MRE) and is responsible for the planning and coordinating of programs for youth grades 9-12 by working with adult advisors, staff and parents. In addition, the YPC is responsible for coordinating the Our Whole Lives (OWL) sexuality education programs at First Church.

For our 2022-2023 church year our youth group consisted of in person programming for youth in grades 9-12 from September 2022- December 2022 and then in January 2023 our middle school youth in grades 6-8 joined our high school youth on Sunday mornings. We used our Soul Matters resources, and community building activities/games to add more structure to our youth group this year connecting to our monthly church themes.

I maintained my 18 hour/week staff position at the start of this church year however, by February 2023 my hours were decreased to 10 hours/week due to the decrease of the number of youth as active participants post pandemic.

Each year continues to bring me great joy and satisfaction knowing that I can make a difference in the lives of our youth at First Church.

OUR WHOLE LIVES (OWL) PROGRAM

We offered our Grade 10-12 OWL program for the first time in the Fall of 2022 but were not able to hold this class due to lack of enrollment.

We hosted TWO OWL trainings at First Church this year so that we have more of our church members trained to facilitate OWL programs for grades K-12. Our first training for Grades 7-9 took place at First Church on August 19-22, 2023 and we trained three of our church members: Crysta Jarczynski, Sarah Richards and Jessie Moffat. Our second training we hosted on January 20-22, 2023 for grades K-6 and we trained seven church members: Marissa Riepenhoff, Stacey Thieme, Stacy Koenen, Rollie Hanson, Eric Graff, Amy Horst and Kathy Herbst.

With our newly trained OWL facilitators we successfully launched our Grade 4-6 OWL program from March to June 2023 and had 11 youth participate.

We will be offering our Grade 7-9 OWL program for the entire church year 2023-2024 and revisiting our Parent/Caregiver Online OWL program.

We are continuing to offer sexuality resources, curated for families and children and youth of all ages through our RE Weekly communications.

I attended many of the monthly webinars sponsored by the UUA and UCC throughout this church year including topics of Autism- Inclusive OWL, Sex Ed Trivia!, OWL curriculum revisions and updates, and You Know, Sex with author Cory Silverberg.

YOUNG RELIGIOUS UNITARIAN UNIVERSALISTS (YRUU: 9-12 grades)

We are still building and restructuring our youth group and invited our middle school youth in grades 6-8 to join our grade 9-12 high school youth in January 2023 to create one youth group. Using our Soul Matters resources we connected our lessons with our monthly church themes. Our Soul Matters resources provide us with ritual, spiritual practices,

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discussion questions on our topic, an activity for expression purposes and fun & game ideas tying into our theme.

The annual youth service (March 5), Hold Space for Vulnerability, was in person this year and featured 11 youth participating in the process of creating this youth worship under Rev. Kimberlee's leadership. Change is uncomfortable and hard; it makes us feel vulnerable. Yet, Brene Brown tells us "Vulnerability is the birthplace of love, belonging, joy, courage, empathy, and creativity." In February Rev. Jennifer spoke about our living tradition turning more towards love, and our opportunity to embrace upcoming changes on our stated core UU theological values. In this service, youth "tried on" the new stated UU theological values through words and photos in a service that explored the Article II propose changes which will be voted on at General Assembly June 2023 in Pittsburgh, PA. This service was well received and appreciated by the congregation who is still learning about Article II.

Youth selected Pathfinders as the March Share the Plate recipient.

Our Hearts on Fire program for our graduating high school seniors, our Youth Steering Committee, and our annual service trip were all put on hold this church year.

Special thanks to our caring and supportive 2022-2023 youth advisor team members: Rollie Hanson, Nick DaVia and Bizzy Schultz.

Blessings,

Deb Solis

MEMBERSHIP/DEVELOPMENT

MEMBERSHIP DEVELOPMENT COORDINATOR

MEMBERSHIP TEAM

Team: Paula Anderson, Dana Brooks, Alexis Fielek, Jeanne Kowalski, Lynda Lambert and Laurie Petersen.

Initiatives

Connecting New Members to smaller groups and service opportunities continues to be a goal and in addition to forwarding interests to relevant leaders' we are inputting new member data in the Member Portal and designing strategies to help leader's and staff access potential volunteers and leaders.

To offer an opportunity for members to re-connect with Journey classmates as well as build relationships with other new members and the membership team we initiated a New Member Pizza Night twice this year and will continue this next year.

The team supported Beer Garden Sundays last Summer and will continue to provide this casual gathering this Summer for New Members, Members and Visitors to gather casually in June, July and August.

Numbers

30 people joined FUSM this church year (16 from our April Journey Class).

111 adult records were entered into our database for the first time this year (July 1, 2021 – April 26, 2022) including 20 of our new members and additional 67 via Welcome/Visitor Cards (mostly on-line this year), 3 Adult Spiritual Development Program Registrants, and 11 new Contributors. The remaining new records are miscellaneous including staff and Members' family.

Thanks

Many thanks to the Membership Team for their patience

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and endless enthusiasm for supporting welcome, engagement and authentic connection for members and visitors alike.

STEWARDSHIP

Annual Fund

With the majority of the Annual Fund conversations happening within the Forge Our Future Campaign conversations clean-up consisted of getting the attention of 146 of our households who had yet to submit an Annual Pledge by February. Given our operating gap the goal, from the Forge Our Future Team, was to increase annual support by 10%. A large part of our membership (124 households) did increase significantly (nearly 16% as a group) that increase has been flattened by losses and I am projecting a flat Pledge Drive from last year, or \$642,000 in total Pledge Commitments.

Known Losses

Of pledges in to date we have a typical number of members who increased (124), decreased (54 this year), and remained the same (149) the year in regards their pledges, and if anything those who increased did so generously (15% overall for this group). These numbers lead me to believe that commitments to the Capital Campaign did not have a negative effect on donor decisions towards the Annual Fund. I do believe we are seeing some delayed effect of the pandemic. Three of our 5 households who resigned due to moves had continued to support us from a distance through the pandemic. Two additional households let us know they had just not come back and realized it was time to resign membership. In total we lost 12 pledging households to date, including 4 deceased, and have 4 new financial waivers request for a total of known loss to date of \$42,624.

Sustaining Our Now

In addition to raising money (and awareness) towards the financial obligations we share to keep our beloved congregation a viable institution in Milwaukee; the Pledge Team is also tasked with helping all of us to connect our pledge commitment to gratitude and the value of this

community in our own lives and beyond. This year we focused on our values as defined by our Ends process Wonder, Authentic Connection, Love and Justice.

Many Thanks to the Forge Our Future Team of volunteers who drove a large part of the Annual Pledge via their one-to-one conversations with a large part of our community. These visits not only opened conversations for many this year, but also, for some, opened a door to re-engagement.

Lynne Jacoby

Membership Development Coordinator

Member-Led Ministries Reports

BLACK LIVES MATTER TO WISCONSIN UUS COLLABORATIVE

BLM2WUU continued to organize and educate ourselves and community members around racial justice. In particular, we focused on:

- Supporting the efforts of each of our five individual UU congregations to understand white supremacy and to advocate for racial justice in our churches and in our communities. At FUSM, our BLM2WUU Liaison functioned as a member of the Black Lives Matter Team.
- Establishing and nurturing relationships with accountability partners from organizations representing people of color in the Milwaukee area, including the Milwaukee chapter of N'COBRA (National Coalition of Blacks for Reparations in America).
- Continuing to grow the Reparations Fund held for the Collaborative by UUUC (United Unitarian Universalist Church) in Waukesha.
- Preparing to disburse the first \$6000 from the fund, with the guidance of our accountability partners.
- Planning and presenting a follow up workshop on Reparations for members of each of the 5 churches, facilitated by Rev. Marilyn Miller, who facilitated our earlier Reparations Workshop in December of 2019.
- Continuing work toward a more permanent structure of the collaborative, addressing mission, composition, roles, and funding.

Mary Devitt

CATHEDRAL CENTER DINNERS

From 2022-2023, FUSM provided meals to Cathedral Center women's center on 1/28/23 & 4/1/23 with another planned for May 2023. Donations were collected to feed up to 60 residents individually prepared Chipotle dinners.

Andrew Sinko

CIRCLES OF SUPPORT

Over the past church year, thirteen members of our team had thirty-nine individual Zoom sessions with Sylvester Jackson, our Circle Keeper, Lavonza Jackson, his wife, and returning citizens, listening, and offering support as those who were incarcerated rejoin our community. We lobbied unsuccessfully for Former Rep. David Bowen's Criminal Justice Data Transparency, but Governor Evers did not include it in his biannual budget. The concern was the threat of "bill hijacking" by legislators seeking to punish certain District Attorneys who were considered to not enforce the law in the manner that the legislators desired. We researched the possibility of renting First Church's eight efficiency apartments to returning citizens who identify as women. This fall our team will be bringing the details of our research to the congregation.

Paul Geenen

COMMON GROUND

Tenants United

After listening to over 1,200 Milwaukee residents living in public housing, Common Ground heard detailed stories of assaults, bedbugs and rats, lost rent payments, abusive management, mold, and a lack of heat. Due to the lack of positive response from the Director of the Housing Authority Milwaukee County (HACM), Common Ground held an assembly in March at Mt. Mary University attended by over 700 in person and 300 on Zoom, with 33 members of First Church in attendance.

As a result, Common Ground has formed a partnership with the residents, building power to address these systemic issues to give residents safe, comfortable homes to live in.

Forward Scholars

Forward Scholars is a tutoring program for Milwaukee Public School students in grades K5-3 who are not yet reading at grade level. Students receive individualized instruction from a caring adult.

First Church is proud to be a major supporter of Forward

Member-Led Ministries Reports

Scholars with 27 volunteer tutors. In addition, Kristi Davis and Molly Schiffler are serving on the Forward Scholars Board.

Reckless Driving

In May 2022, Common Ground and Milwaukee Mayor Cavalier Johnson held a press conference to address two issues — reckless driving and transportation inequity. Part of the problem is that many students simply can't afford driver's education.

To fund the program, Common Ground and Mayor Johnson signed letters asking the three major auto insurers in our area to share the \$1.7 million annual cost of universal driver's education for all Milwaukee high school students.

Common Ground Works

To better serve those in our community who are struggling to find meaningful work, Common Ground has formed a new workforce development and training organization in Milwaukee, Common Ground Works (CGW). CGW will be up and running this year.

WHS Athletic Field

It has been a bit of a marathon, but our campaign to revitalize Washington High School's track and playing field has crossed the finish line! A turf field, a rubberized 400-meter track and basketball half-courts are now under construction.

For more information go to <https://www.commongroundwi.org/> to view more detail and other campaigns.

We wish to express our gratitude to all of the First Church Friends of Common Ground who have supported our work through these years. Should you have any questions about Common Ground or wish to become involved, please contact one of our Core Team members: George Bledsoe, Lynn Connolly, Kristi Davis, Rod DePue, Mary Ann Fisher, Jerry Fredrickson, Allan Jaberg, and Cathy Startt.

Jerry Fredrickson

EARTH JUSTICE MINISTRY

The Earth Justice Ministry (EJM) is proud of keeping some activities going during the pandemic. We developed regular monthly hikes while the church encouraged outdoor activities. We call an outing "Walk and Roll" because we always pick a park with a paved path so people on wheels can participate. One outing at Lakeshore State Park, in addition to the hikers, had a wheelchair, a scooter, and a Segway! We always have a local host who chooses the park and knows the route. This has been our major activity for two years!

EJM members continued as liaisons with two local environmental organizations: COLE, the Coalition on Lead Emergency, and Plastic-Free Milwaukee. COLE is addressing the lead crisis in Milwaukee. Lead in paint, water, and in soil is poisoning people, especially children. P-F MKE's mission is to reduce single-use plastic in Milwaukee and educate people about the harmful effects of plastic on animal, plant, water, and human biology. We sponsored a P-F MKE Forum and they were a recipient of Share the Plate in September 2022. The P-F MKE coalition held frequent webinars and zoom meetings about the effects of plastic.

This Earth Day, April 22, 2023, we encouraged church members and families to volunteer to clean up rivers with Riverkeeper; and we helped organize related activities around an outstanding Earth Day Service on Sunday, April 23. EJM members staffed tables during coffee hours to encourage people to fill out Venn diagrams to identify earth-friendly tasks they want to do. We also took orders for pollinator-friendly plants at a reduced cost with EJM paying part of the cost.

Like much of the church and society as a whole, we have struggled to recover to the level of activities we had before the pandemic. We are looking forward to a "new normal."

Bruce Wiggins & Barbara Leigh, Co-Chairs

INTERFAITH CONFERENCE OF GREATER MILWAUKEE

It's my pleasure to serve as the vice chair of the Interfaith Conference of Greater Milwaukee (ICGM) as we build relationships among people of faith to promote greater understanding, dignity, and respect. Open dialogue with pro-

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grams such as Amazing Faith Dinners and actions to counter hate and fear foster interfaith, intercultural, and interracial understanding, tolerance, and friendship.

With Executive Director Pardeep Kaleka, we actively engaged in the 10 year commemoration of the tragedy of the Sikh temple shooting; then Pardeep started his new assignment, co-directing Not In Our Town. Newly elected Executive Director Ahmed Quereshi will strengthen our history of diversity, equity and inclusion.

In March, ICGM returned to First Church providing 4 Tuesday Lunch and Lectures: DEMOCRACY IN PERIL Week 1: Professor Amber Wichowsky—Civic Dialogue.

Week 2: Phillip Chard—inside the political mind—an exploration of why people embrace conspiracy theories, believe obvious lies.

Week 3: James Santelle—Peril in the Supreme Court: The Major Cases Challenging our Republic.

Week 4: Lee Hawkins—Through the Ages: Weaponizing Religion for the good and bad in the name of Democracy. Advocates from Rank Choice Voting, Souls to the Polls, and the League of Women Voters provided defend democracy resources.

From Pat McFarland

SUNDAY MORNING FORUM

The Sunday Forum Group endeavors to offer a variety of timely and interesting Forum topics and presenters each week at First Unitarian Society-Milwaukee. We have regular attendance from members, their friends, as well as visitors from the Milwaukee community who find our church Website. The visitors often mention that the Forums are a comfortable way to “get a feel” for church, then they attend services and eventually find their way to coffee hour. This year was no exception as we watched in-person attendance grow, the mask policy change through time and by mid-Spring there was coffee and hot water for tea. (Thank you to Jim Spice!)

Mark and I thank all the members of the Sunday Forum Group. They are the ones finding, inviting, supporting and

hosting presenters. Group members include: Jerry Fredrickson, Christian Becker, Barbara Collignon, Dianna Dentino, Thallis Drake, Dan O’Keefe, Barbara Leigh, Trent Miller, Bruce Wiggins, Deb Solis, Jo Ann Bachar, Pat McFarland. The Church Year has an average of 36 Sundays, if we “do the math” there are twice as many Sundays as Group members! Often members host 2 or more presenters in a year. The history of Sunday Forums has been consistent in providing a variety of topics; local organizations, social justice work, political topics, creative arts and then just the “funky” interests of people who like to share their hobbies, sports or personal commitments. A sample may include: County Parks with Sheldon Wasserman, “Democracy Ain’t Easy” with Mark Richards of WUUSAN, Public Schools with Heather DuBois Bourenane, Wisconsin Public Education Network, Congresswoman Gwen Moore, Matt Rothchild to share his take on the Election results and fighting for Democracy, “A Creative Place, Wisconsin Art History, Immigration for Afghan Refugees, “Democracy and the Wisconsin Supreme Court” with Elizabeth Pierson, Plastic Free MKE, culture and activism within the Menominee Indian Tribe, Psalms and Music with Karen Beaumont, “Anti Trans Violence”.

I hope I have enticed you to bring your energy and connections and join the Sunday Forum Group.

We meet just twice a year. Much of the work is done on your own. Experienced members guide you and answer questions. We encourage new members in the teen to 40 yr. demographic as well as those with technology skills to help with keeping the computer going, microphones working and the zoom, well, “zooming”. Contact Lorraine Jacobs jacobslm@sbcglobal.net or Mark Mueller muellerx@sbcglobal.net to sign up!

Lorraine Jacobs and Mark Mueller
Co-Chairs

THE SWANS (SENIOR WOMEN ARE NATURALLY SOCIAL)

We didn’t meet at all during Covid shutdown but a dozen of us met for lunch on March 5th. A lunch meeting was planned for April 2nd but the day being a holiday, everyone had other plans. We do plan to get together regularly on

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the first Sunday of the month through the remainder of the year.

Barbara Collignon

THE CHRONOLOGICALLY GIFTED

The Chronologically Gifted have met regularly for fellowship and potluck lunches after church since September of 2022. Well attended, numbers varied but ranged from 12 to 18 attendees. We share jokes and offer opportunities for involvement for social justice and events in Milwaukee that may be of interest. One of the gatherings featured a visit from Janet Nortrom and her family. Another celebrated the 92nd birthday of Nell Crain. We also informally celebrated the 95th birthday of Thallis Drake.

In addition to potlucks, members graciously donated food and refreshments to the reception for Beverly Katter's family and friends after her memorial service on Saturday, October 28, 2022.

Barbara Collignon and Pat McFarland, Co-chairs

**The congregation of The First Unitarian Society of Milwaukee
affirms and promotes the full participation of persons in our activities without regard to race, color, gender,
physical or mental challenge, sexual identity or orientation, age, class, national origin, or ancestry.**

**Indeed, we are interested in actively promoting
more diversity within our congregation.**