

# 2023-2024 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

**2023-2024 Operating Budget: \$1,069,625**

**Adult Members: 632**

**Religious Education Enrollment: 81**

**Contributing Households: 402**

## 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 (through July 2023)

### MINISTERIAL INTERN

Steve Sieck

### DIRECTOR OF ADMINISTRATION

Jean Johnson

### MEMBERSHIP DEVELOPMENT COORDINATOR

Lynne Jacoby (through November 2023)

### OFFICE MANAGER

Shari Wright

### FACILITIES MANAGER

Ken Liddell

### FACILITIES ASSISTANT

Jim Spice

## 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 CONTINUED

### LEAD MUSIC DIRECTOR

Alissa Rhode

### CHORAL DIRECTOR

Tristan Strelitzer

### COLLABORATIVE PIANIST

Teresa Drews

### YOUTH PROGRAM COORDINATOR

Deb Solis

### RELIGIOUS EDUCATION ASSISTANT

Kaitlin Barron

### EARLY CHILDHOOD COORDINATOR

Mariah Groshek

### NURSERY CAREGIVER

Cecelia Groshek

# A MESSAGE FROM THE PRESIDENT

This 2023-24 church year has offered our congregation opportunities to grow and thrive in the “new normal” of post-COVID community building. As combined in-person and on-line attendance at worship begins to surpass pre-COVID numbers, we celebrate the flexibility of staying connected beyond the constraints of geography, weather, and mobility. The successful return of Feast for Funds helped raise our spirits as well as the bottom line, with events like the joyful first House Band concert welcoming us out of winter hibernation.

A decision not to replace the staff position of Membership Development Coordinator led to a reconfiguration of our membership teams and a new membership growth strategy. Enrollment in Journey to Membership classes remains strong, suggesting that our digital presence, as well as personal invitation, can contribute to the growth and diversity of our church community.

Despite staffing reductions, however, we are again facing a deficit budget for 2024-25. Operating pledges remain flat, and we continue to fall short of UUA Fair Compensation guidelines. A sustainable future requires that income, from annual pledges and, eventually, from endowment earnings, offsets inflationary expenses. We continue to work toward meeting the goal of fiscal sustainability.

The Board renewed its plan to add non-voting youth members to its membership. Since the Youth RE program is still in rebuilding mode this church year, we were unable to recruit two members who were able to serve. We will continue to assess youth interest and willingness to serve on the Board, and this item will be carried into the next church year.

In January 2023, the BOT created a limited-term Endowment Fund Task Force (EFTF) to set up legal and operational parameters for the new fund. That team reported to the BOT in written form as well as live during several meetings, and trustee George Bledsoe served as the board liaison to that team.

A preliminary statement encompassing the trust agreement, the choice of an investment manager organization, and a process for naming endowment fund trustees was brought to the Board of Trustees in November 2023. After

deliberation, consensus was reached regarding the precise wording of the trust agreement, acceptable choices for fund investment managers, and a process for nominating Trustees of the Endowment Fund.

At the January 2024 BOT meeting trustees unanimously approved the following nominees as trustees of the Endowment Fund: Betty Schroeder (2-year term); Ron Oshima (4-year term); and Dave Becker (6-year term). The final execution of the Trust Document was approved unanimously at the BOT March 2024 meeting, along with a plan for Board and Endowment trustees to communicate details of the plan to the congregation.

The FOF Trust is a separate entity from the church and must be certified as tax-exempt by the Internal Revenue Service. FOF endowment money will be transferred from CDs to the Trust when tax-exempt status has been achieved. Going forward, the FOF Endowment Fund Communication Team, co-chaired by Dave Becker and George Bledsoe, will update the congregation with details and answer any questions concerning the Fund.

When the current board of trustees met for a brain storming retreat last August, two priorities dominated our discussion. The first was to consider how to improve communication between the BOT and members of the congregation, our “Sources of Authority.” Trustees made a concerted effort to be present at worship and coffee hour, to greet new members and visitors, and to support and participate in the projects of social justice, RE and social groups. We are concerned about the declining response rate for the annual congregational survey and are looking for creative ways to garner additional feedback from the members. Suggestions are welcome!

The second priority we discussed at the BOT retreat was how to continue foregrounding anti-racism (AR) within the purview of policy governance. Following two previous BOT retreats focused on Anti-Racism, the BOT renewed its commitment to lead the congregation in pursuing our goal of “partnering to move the Milwaukee community toward justice.” Two trustees of this year’s board are members of the FUSM anti-racism team and kept their fellow trustees abreast of and engaged in such AR events

# A MESSAGE FROM THE PRESIDENT

as the 2023 Juneteenth Service, Rev. Tutu's September lecture, and the March church-wide Anti-Racism training event, "Building a Healthy Multicultural Community." One current initiative of the AR team is to encourage the selection of BIPOC projects as Share the Plate partners to increase the congregation's awareness and support of these programs.

I have no doubt these two priorities will continue to shape the work of the 2024-2025 board as they represent the congregation (their Sources of Authority) in our collective journey to the ideal of The Beloved Community. I am immensely grateful to my fellow trustees for their willingness to share the governing responsibilities, their generosity and good humor in achieving consensus, and their dedication to our church community.

Pat Geenen

BOT President

# 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

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## MISSION STATEMENT

We gather together to:

Nurture the Spirit. Engage the Mind. Inspire Action.

# 2022-2023 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, Ron Oshima, Holly Patzer, Alisha Koneazny, Laura White, 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, 2022 – June 30, 2023**

Page 7 compares the budget and final income/expense statement for the 2022-2023 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 \$204,750 for the church year. Final numbers for "Income Net of Operations," not including extraordinary income, show a negative balance of \$193,091 (\$11,659 better than expected).

- Income**
- Total income was \$805K which was 4% (\$36K) below the budget of \$841K.
  - Pledges (\$732K) were \$7K (1%) above budget.
  - Total activity income (\$3.6K) was below budget 87% due to COVID restrictions. Feast for Funds was cancelled.
  - Investment income (\$17.9K) was below budget 38%. This income includes interest and dividends minus expenses and bank charges. Interest rates were low on CDs at the beginning of the year but have increased significantly. UUCEF funds returns have been slightly lower than expected, while bank charges were higher than expected.
  - The apartment income was above budget 24%. There is full occupancy; however, several repairs were required early in the year.

- Expense**
- Total expense was \$988K which was 5% (-\$48K) below the budget of \$1,046K:
  - Salaries & housing budget (\$576K) was 6% below budget. Salaries were low due to late hiring of a new Facilities Manager, and the Digital Outreach Coordinator position being vacant all year.
  - The UUA, MICAH, Interchange and Interfaith Conference contributions were paid in full. UU Congregations in Crisis and FUSM-Sponsored Seminarian contributions were not paid.
  - Basic operations (3%), religious education (3%) were over budget while committee expenses (-57%) were low as expected due to COVID. Building expenses are 10% over budget because the Capital Maintenance Fund is now depleted.

# 2022-2023 ANNUAL FINANCIAL REPORT

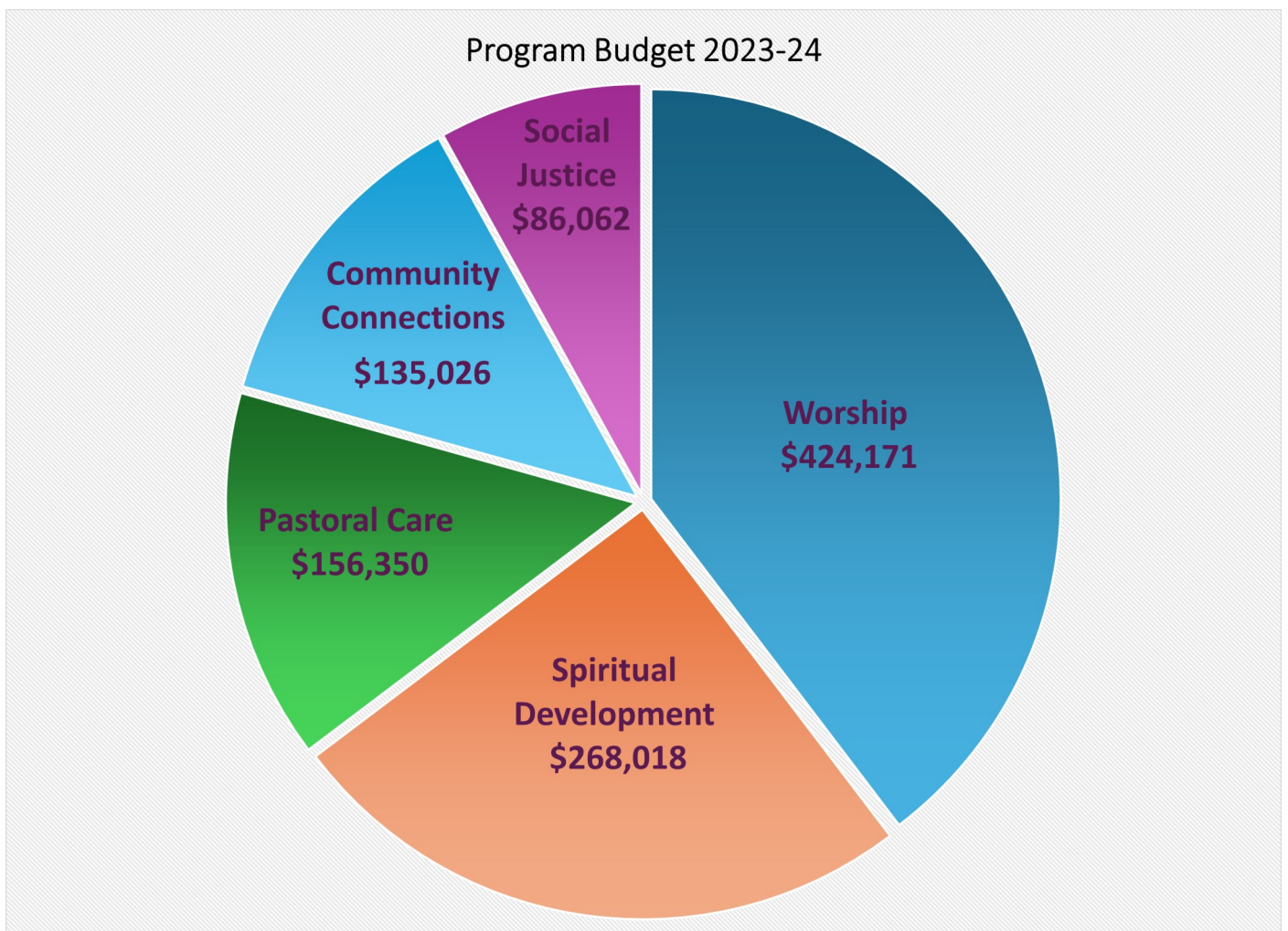
## Income and Expenses

July 1, 2022 – June 30, 2023

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.

**This Program Budget shows how our budget serves our mission.**





## FUSM 2022-23 INCOME & EXPENSE HIGH LEVEL SUMMARY

ITEM	'22 - '23	'22 - '23	Variance	
	BUDGET	FINAL	Amount	%
<b>Contributions</b>				
Pledges	725,000	732,024	7,024	1%
Other Contributions	41,700	28,668	(13,032)	-31%
<b>Total Contributions</b>	<b>766,700</b>	<b>760,692</b>	<b>(6,008)</b>	<b>-1%</b>
<b>Activity Income</b>				
Feast for Funds	20,000	-	(20,000)	-100%
R E Fees	3,500	2,974	(526)	-15%
Other Sources	3,583	614	(2,969)	-83%
<b>Total Activity Income</b>	<b>27,083</b>	<b>3,588</b>	<b>(23,495)</b>	<b>-87%</b>
<b>Investment Income</b>	<b>29,000</b>	<b>17,947</b>	<b>(11,053)</b>	<b>-38%</b>
<b>Apartment Income Net of Expenses</b>	<b>18,500</b>	<b>22,966</b>	<b>4,466</b>	<b>24%</b>
<b>TOTAL INCOME</b>	<b>841,283</b>	<b>805,193</b>	<b>(\$36,090)</b>	<b>-4%</b>
<b>Human Resources</b>				
Salaries, Wages & Minister Housing	610,500	575,793	(34,707)	-6%
Professional Expenses	26,058	20,654	(5,404)	-21%
Insurance - Health & Disability	96,194	97,147	953	1%
Retirement Savings	52,000	53,943	1,943	4%
Payroll Taxes	30,000	25,463	(4,537)	-15%
Other	12,016	11,210	(806)	-7%
<b>Total Human Resources</b>	<b>826,768</b>	<b>784,209</b>	<b>(42,559)</b>	<b>-5%</b>
<b>Budgeted Contributions</b>	<b>23,050</b>	<b>21,750</b>	<b>(1,300)</b>	<b>-6%</b>
<b>Building Expenses</b>	<b>77,296</b>	<b>84,759</b>	<b>7,463</b>	<b>10%</b>
<b>Basic Operations</b>	<b>86,230</b>	<b>89,129</b>	<b>2,899</b>	<b>3%</b>
<b>Religious Education</b>	<b>7,152</b>	<b>7,380</b>	<b>228</b>	<b>3%</b>
<b>Committees</b>	<b>25,537</b>	<b>11,057</b>	<b>(14,480)</b>	<b>-57%</b>
<b>Extra Operations</b>				
Transfer from Fund Balance	(237,260)	(233,648)	3,612	-2%
Capital Maintenance	47,000	-	(47,000)	-100%
Capital Campaign Consultant & Misc	150,200	207,018	56,818	38%
Sabbatical Minister Coverage	18,000	14,539	(3,461)	-19%
Krug Projects/Thaney/Music Fund	17,060	12,091	(4,969)	-29%
Morter Lecture Committee	5,000	-	(5,000)	-100%
<b>Total Extra Operations</b>	<b>-</b>	<b>0</b>	<b>0</b>	<b>0%</b>
<b>TOTAL EXPENSES</b>	<b>\$1,046,033</b>	<b>\$998,284</b>	<b>-\$47,749</b>	<b>-5%</b>
<b>NET INCOME FROM OPERATIO</b>	<b>-\$204,750</b>	<b>-\$193,091</b>	<b>\$11,659</b>	<b>6%</b>
<b>Extraordinary Income</b>				
Bequests	\$0	\$80,759		
Gain/Loss on Investment (unrealized)	\$0	\$108,397		
<b>EXTRAORDINARY INCOME</b>	<b>\$0</b>	<b>\$189,157</b>	<b>\$189,157</b>	
<b>NET INCOME</b>	<b>-\$204,750</b>	<b>-\$3,934</b>	<b>\$200,816</b>	

## 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, 2023, First Church had two unrestricted CD's valued at \$141K and \$119K in operational accounts. This money satisfies the safety net of 15% of budgeted operating expenses (\$1,046K). These funds, in addition to the unrestricted fund balance, satisfies the Investment Objective by Fund Schedule which requires an additional 15% of operating expense "Back-up Safety Net." 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 8.75% for the Fiscal YTD. Additional investments include a Brewery CU CD with 3.25% interest, a Self-Help CU CD with 3.2% interest, a Landmark CU CD with 1.39% interest, an Associated Bank CD with 5.0% interest and two investment accounts with WWBIC at 1% and 2%. The Associated Bank and Landmark CU CD's hold Endowment Fund contributions. Funds at WWBIC, Self-Help CU, and UUCEF comply with our Socially Responsible Investment policy.

## Balance Sheet

### June 30, 2023

**Total net assets were \$2,234K, which was 24% higher than June 30, 2022. This is attributed to the contributions to the Forge our Future Endowment Fund.**

### 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 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.
- Capital Campaign: This fund contained funds that the Board designated for expenses of the Forge our Future Capital Campaign to establish an Endowment Fund. The funds have been depleted.
- Forge our Future Endowment fund: This fund contains restricted funds that have been received by the congregation to establish an Endowment Fund.

#### Unrestricted Funds Designated by the Board

- Capital Maintenance Reserve: This fund contained unrestricted bequests and donations that the Board designated for capital maintenance. The funds have been depleted.
- 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 have continued 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.

**FUSM BALANCE SHEET FOR FY 2022-2023**

6/30/2023

<b>ASSETS</b>		
	June 30, 2022	June 30, 2023
<b>CURRENT ASSETS</b>		
Cash	\$37,767	\$73,905
Money Market	\$182,142	\$37,321
Endowment Holding Account		\$283,464
Other	\$15,720	\$7,866
<b>Total Current Assets</b>	<b>\$235,629</b>	<b>\$402,557</b>
<b>INVESTMENTS</b>		
Memorial Trust Fund - UUCEF	\$317,347	\$328,436
WWBIC	\$21,435	\$21,435
CD's	\$188,679	\$140,838
Endowment Holding CD's	\$0	\$525,561
General Fund - UUCEF	\$1,038,407	\$815,840
<b>Total Investments</b>	<b>\$1,565,868</b>	<b>\$1,832,110</b>
<b>TOTAL ASSETS</b>	<b>\$1,801,496</b>	<b>\$2,234,667</b>
<b>LIABILITIES AND FUND BALANCE</b>		
<b>CURRENT LIABILITIES</b>		
Prepaid Pledges	\$41,705	\$69,365
Apartment Security Deposit	\$3,244	\$2,994
YRUU Account & Service Trip Savings	\$5,305	\$5,305
27th Pay Period Accrual	\$20,434	\$22,184
Other Liabilities	\$4,926	\$833
<b>Total Current Liabilities</b>	<b>\$75,613</b>	<b>\$100,680</b>
<b>RESTRICTED FUNDS</b>		
Sabbatical Accrual	\$15,184	\$3,462
Morter Fund - Donor Restricted	\$64,247	\$64,247
Tom Thaney for the Arts	\$3,980	\$3,980
Capital Campaign	-\$7,500	\$0
Memorial Trust Fund	\$317,347	\$328,436
Forge our Future Endowment Fund	\$50,000	\$809,025
Minister's Discretionary Fund	\$8,266	\$5,306
<b>Total Restricted Funds</b>	<b>\$451,524</b>	<b>\$1,214,457</b>
<b>UNRESTRICTED FUNDS</b>		
Unrestricted Fund Balance	\$1,303,990	\$663,630
Net Income	-\$283,043	-\$3,934
Capital Maintenance Fund	-\$17,038	
Krug Special Programs Fund	\$262,809	\$258,674
Music Programs Fund	\$7,643	\$1,161
<b>Total Unrestricted Funds</b>	<b>\$1,274,360</b>	<b>\$919,530</b>
<b>TOTAL LIABILITIES AND FUND BALANCE</b>	<b>\$1,801,497</b>	<b>\$2,234,667</b>

# BOARD COMMITTEE & TASK FORCE

## NOMINATING COMMITTEE

As a committee of the Board of Trustees, the Nominating Committee is charged with nominating members for the Board and the Nominating Committee. This church year, the Nominating Committee met monthly since November 2023.

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.

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 could bring diversity of background to our leadership teams. The five members of the Nominating Committee conducted approximately 20 one-on-one meetings, and also reached out to four additional members to discuss how they might like to be involved as leaders. We find using the 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 also connected with current Board of Trustees liaison Stacy Koenen to determine anticipated needs and skill sets for Board of Trustees members, and contacted church leaders as well as the Endowment Fund Task Force to identify people in our church community that we should talk to about church involvement and potential leadership.

Additionally, this year the Nominating Committee was asked by the Endowment Fund Task Force to nominate three Endowment Fund Trustees, who will serve staggered terms as follows: Betty Schroeder: 2-year term, Ron Oshima: 4-year term, Dave Becker: 6-year term. These Trustees were approved by the BOT in January and are now actively serving. In addition to ourselves,

Nominating Committee members this year were: Anne Alexander, Jason Ludtke, Michael Pointer Mace, working with 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.

Susie Seidelman and Jane Cliff, Co-chairs

## ENDOWMENT FUND TASK FORCE



In January 2023 the Board of Trustees formed the Forge Our Future Endowment Fund Policy Task Force (EFTF) 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.

The EFTF began its work by defining the mission statement for the Endowment Fund:

The purpose of the Endowment Fund of The First Unitarian Society of Milwaukee ("the Society") is to provide a means whereby monies and other assets may be received, managed, and invested. The principal (corpus) of the Endowment Fund shall be protected. Income of the Endowment Fund may be dispersed from time to time to meet the operating, strategic, and other financial needs of the Society, all as determined

# BOARD COMMITTEE & TASK FORCE

*(Continued from page 12)*

by the Board of Trustees of the Society.

In February 2023 the EFTF began 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. At the conclusion of its research in March 2023 the EFTF recommended, and the Board approved structuring the Endowment Fund as a Trust which will be a tax-exempt organization created through a Trust Agreement between First Church and three initial Endowment Trustees. The Trust will be administered by the Trustees. The sole purpose of the Trust is to support the First Unitarian Society of Milwaukee.

Outside legal counsel Ann Rieger of the law firm Amundsen Davis, LLC was retained to draft the Trust Agreement. Throughout 2023 and early 2024, the EFTF engaged in significant discussions among its members, with legal counsel, and with the Board to ensure that the terms of the Trust Agreement met the goals to establish a permanent endowment that would protect the principal of contributions while providing stable and consistent distributions to First Church. The Trust Agreement was finalized, approved by the Board, and executed in March 2024. With the Trust established, a necessary next step is to register the Trust as an independent 501c3 entity with the IRS to ensure its own tax-exempt status. This registration is in process and is expected to be completed before the end of 2024.

Also, in February 2023 the EFTF began researching options for an investment vehicle and fund manager for the Endowment Fund. The team compiled a list of potential managers from a variety of sources, including other local churches and nonprofits, and personal and professional contacts. A subgroup then conducted numerous interviews with many of the firms on the list along with many follow-up interviews.

At the Board's request the Nominating Committee re-

cruited and nominated three initial Endowment Trustees who were approved by the Board in January 2024. They are Betty Schroeder, Ron Oshima, and David Becker. In subsequent combined discussions between the EFTF and the initial Endowment Trustees, the group reached consensus in selecting the Unitarian Universalist Common Endowment Fund of the UUA to be the initial investment vehicle and fund manager for the Endowment.

With the Trust Agreement fully executed the responsibility for next steps regarding the Trust now falls to the Endowment Trustees and the EFTF's charge from the Board has been completed.

In April 2024 the EFTF continued to meet with a newly formed Endowment Communication Team co-chaired by David Becker and George Bledsoe to prepare to share information about the Endowment with the congregation and answer any questions. The Endowment Communication Team held four Q&A sessions, two in-person sessions on Sunday May 5 at First Church following each service and two by Zoom on May 8 and 9.

Members of the EFTF are David Becker (co-chair), Elizabeth Lentini (co-chair), George Bledsoe, Tom Briscoe, Ron Oshima, and Kathy Rivera.

# ANNUAL MEETING MINUTES: May 21, 2023

Board of Trustees (BOT) members present: Ben LeFort (President), George Bledsoe (Secretary & Recording Secretary), Amy Wilbourne, Tony Panciera, Sarah Richards, Joe Riepenhoff and Rollie Hanson.

Not present: Pat Geenen (Vice President). Rev. Jennifer Nordstrum (Sr. Minister) (Sabbatical).

## Call to Order

Congregational President Ben LeFort called the meeting to order at 12:48pm. The meeting was conducted in person and via videoconferencing (Zoom). Quorum, a minimum of 59 active members, was achieved with (72) members in person and (22) persons online to start the meeting. Closed captions were requested online, and the electronic version of the packet was shared in the

chat. Ben advised of the two voice votes that will be taken in the meeting.

## Approval of the 2022 Annual Meeting Minutes

Elizabeth Lentini moved to approve the 2022 Annual Meeting Minutes. Mark Chambers seconded the motion. Motion passed unanimously.

## Remarks from the BOT President (Ben LeFort)

Ben reflected on the various phases of restrictions the congregation has endured due to the COVID pandemic. He emphasized the excitement of coming back to church in person and the eventual relaxing of the mask mandate. Attendance, which had been low and sporadic during the pandemic, is steadily coming back for in person and online. The BOT limited some reporting during phases of the pandemic and due to Rev. Jennifer's sabbatical. The annual pledge drive was relatively flat in comparison to last year's. However, the Forge Our Future campaign rolled out and acted as an opportunity for the congregation to have conversations and to reconnect in addition to the purpose of the fund. The BOT passed the budget for the next church year. Additionally, the trustees are deepening our effort with Anti-Racism training. Ben closed with a heartfelt thank you to the congregation, staff, BOT, and all the committees that support and sustain our community.

## Nominating Committee Report (Kristine Hansen)

Kristine was not present due to illness, so Ben LeFort presented on the committee's behalf.

The Nominating Committee thoughtfully looks at a variety of factors such as life experiences and backgrounds of members to identify leaders to serve our community.

The Nominating Committee is nominating three members for a three-year term to expire in 2026 for the BOT. They are Victor Dana Brooks, Stacy Koenen and Stacey Thieme. For the Nominating Committee, two members are being nominated for three-year terms to expire in 2026. They are Jane Cliff and Michael Pointer Mace.

Motion to approve the slate of nominees for BOT was made by Kathy Riviera. Seconded by Connie Craig. Motion passed with all members present voting in favor except for one voting against.

Motion to approve the slate of nominees for the Nominating Committee was made by Rollie Hanson. Seconded by Amanda Panciera. Motion passed unanimously.

## Financial Condition Report with Q&A (Noreen Gilbertsen)

Noreen opened the report with thanks to the finance team, staff and all others that have contributed to the monitoring and maintenance of our church finances. Noreen asked that we pay specific attention to Total Income (TI), Total

Expenses (TE), and Income Net of Operation (INO) in her report. Highlights of FY 2021-22 found final pledges came to \$728k with TI coming in at \$799k, TE were at \$940k and INO's final was -\$141k. It was somewhat of a bad year for our investments as investment gains were -\$219k. Bequests totaled \$77k in FY 2021-22. Human Resources continues to be the biggest expense with the final for 2021-22 coming to \$766k.

Noreen provided that our Total Assets were at \$1,801k as of June 30, 2022. The General Fund was \$1,038k, the Memorial Trust Fund \$317k, Cash Deposits (CDs) \$188k and Cash on Hand was \$235k. Noreen provided some information about the investment of \$21k in Wisconsin Women's Business Initiative Corporation (WWBIC). WWBIC is a statewide business initiative that focuses on individuals who face barriers in accessing traditional financing or resources. Noreen confirmed that the Memorial Trust Fund cannot be touched except for in the most urgent instances in which the funds may be needed. Noreen expressed that CD rates are up, and we have secured rates up to 5%.

For the current fiscal year, Forecasted Income is at \$810k and budgeted for \$841k. Income from activities such as Feast for Funds, which was not held again this year, was down as expected. Income from the apartments is up, as they are at full occupancy. Forecasted Expenses are \$997k, just under the budget of \$1.05M. HR is lower due to unfilled or partially filled positions. Building and basic operations are on track. Net Income from Operations, or income minus expenses = -\$187k vs budget of -\$205k. For Extraordinary Income, unrealized gains on investments are forecasted at \$56k. Bequests are forecasted at \$108k.

Additionally, Noreen reported that current donations for the Forge our Future (FOF) endowment fund exceed \$700k. Funds for FOF are temporarily in a dedicated Money Market account and 2 CDs. The Endowment Fund Task Force (EFTF) is charged with establishing the FOF Endowment Fund.

The principal from the fund will not be accessed; however, gains may be applied to the deficit. Guidelines for the endowment are being determined by the EFTF and the BOT.

Finally, Noreen shared forecasts for the upcoming church year, in which a 3% increase in income is expected with pledges at \$728.5k, Feast for Funds at \$15k and income from the FOF Endowment Fund at \$30k. An increase of 2% in expenses with a 3% increase for HR is projected. Budgeted Income Net of Operations is expected to be almost the same as this year. Income minus expenses = -\$205k.

There was a question of when funds for the FOF campaign were due? Until the end of 2025 was the response.

Another questioner wanted to know if we are putting more funds into WWBIC? Noreen replied that we are not putting money into the Calvert Fund anymore and that we are putting more funds into WWBIC as a means of providing more support for local issues. A final questioner wanted to know what is the difference between the Forge our Future Endowment Fund and the Endowment Fund (Memorial Trust Fund)? Dave Becker responded: The FOF endowment fund will be a newly established fund outside of the Memorial Trust Fund. The FOF endowment fund is being established to fill budget shortfalls with a principal protection feature and other aspects that the Memorial Trust Fund does not have. There was some discussion on the FOF Endowment Funds Task Force about combining the two funds, but the decision was to not do so.

### **Forge Our Future Campaign Report with Q&A (Mark Chambers, Hollie Patzer)**

Mark started the report saying that two years ago on May 16, 2021, a resolution was passed to start the groundwork for an endowment fund now known as Forge Our Future. Staff and over 50 congregants volunteered. The task force held 14 in person and virtual Focus Groups. 34 volunteers visited 248 households—with 204 households pledging. Hollie stated that the campaign helped to rebuild a bond with our community. Hollie spoke of the excitement of the campaign kickoff street party on October 23, 2022. The campaign has raised \$2,724,303 as of May 10, 2023. Approximately 50% of pledging households have pledged for FOF. To conclude, Hollie advised that fundrais-

ing for budgetary reasons is harder than fundraising for something such as a new building or something tangible such as a broken boiler etc. No questions were presented.

### **Forge Our Future Endowment Task Force Update with Q&A (Elizabeth Lentini, Dave Becker)**

Elizabeth opened with a note of Unitarian Universalist's deliberation in planning and accomplishing things, adding that this is how we roll. She advised that our building was a legacy and that current generations did not have anything to do with building it. The Memorial Trust Fund was established around 1920 and codified in 1963. Dave presented the mission statement of the Endowment Fund Task Force (EFTF) and that it is a short-term board committee charged to research, draft an Endowment Fund Policy, ensure principal protection, identify investment vehicles and fund manager, establish a Trust recommending appropriate oversight and a plan for regular communication to the congregation. The EFTF has conducted initial research, recommended to use a Trust as legal framework, interviewed, and selected legal counsel, and discovered multiple options for fund managers. Next goals include finalizing key points of a Trust document, selecting Trustee(s) and recommending a formula for principal protection and distributions to support ongoing operations.

A question was asked about the use of the word recommendations from EFTF in the report and wanted to know if there will be an approval by the board or by a congregation vote? Elizabeth responded that the congregation vote was 2 years ago. Recommendations are being made by EFTF. The BOT will give the final approvals. The funds are going to be used to cover shortfalls. The BOT will determine how the funds will be used.

An additional question asked was how does long-term capital maintenance fit into plans? Elizabeth explained that there is already a maintenance fund for this purpose, and it is included in the budget.

### **Stewardship Report with Q&A (Lynne Jacoby)**

Lynne started by giving a big thanks to the 93% of our community who has participated in the Pledge Drive as of May 10, 2023, and to the 125 households, or 33% of our households that increased their pledge this year. Lynne provided pledge data as of May 10, 2023, in which we had 350 household pledges in hand for an amount of \$721,782. There are 38 current members without pledges, which corresponds to a 30% projected loss, or \$21,226. There are currently 10 waivers on file. 19 households stopped/withdrew their memberships. Considering pledges in hand, projected members without pledges, waivers on file and the 18 projected households from 2 new member classes, the total projected households come to 408 with a projection of \$727,718 in pledge income. Lynne concluded by thanking the Forge Our Future team and volunteers who engaged in stewardship conversations, over and over, with so many of us this year. No questions were presented.

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

Rev. Kimberlee noted that this is the first full year back for Religious Education (RE) since the COVID pandemic and it is a significant milestone for the RE program. She also noted that RE returned and renewed with the support of many helping souls, and that the RE program depends on volunteers to facilitate the care for our children, youth, and families and that she is grateful to all of those who contribute. Rev. Kimberlee said that Our Whole Lives comprehensive sexual education (OWL) classes were a reason for many families to return, and that new families found First Church to be a spiritual home and were welcomed into this faith community.

Rev. Kimberlee reported some changes in the RE program coming this fall. Preparations have begun to shift RE from an age segregated, teacher led, lesson-based format to a more intentional child friendly time in the sanctuary, followed by an open space choice program with adult facilitation during the 9am services. Faith formation programs such as OWL will sometimes be scheduled separately and on Sunday mornings. Nursery and pre-school will continue to be offered during both services.



Rev. Kimberlee acknowledged a challenging and deeply rewarding year in religious education. And that she is grateful to be in collaboration with so many wise and caring people who prioritize our young people and families.

#### **Remarks from the Associate Minister (Rev. Dena McPhetres)**

Rev. Dena opened remarks with our state of community and emergence from the COVID pandemic. She offered recognition and thanks to all the teams, committees, etc... that have persevered in service to our community. Additionally, she reported on the how things are going in relation to the sabbatical that the senior minister is on currently, stating that the sabbatical is going well and that there was only one instance in which she needed to use the magic wand. Rev. Dena extended a special thank you to the staff team and the sabbatical committee. Also, appreciation was given to the stellar series of pulpit guests during the sabbatical. Rev. Dena asked that we ponder and ask ourselves the question, "What do we want to do now that we are back?" Rev. Dena concluded by declaring the state of our church is healthy, strong, and vibrant!

#### **New Business / Comments from the Congregation with Q&A:**

Comment: Someone asked that congregants attend Peace related events that will be take place throughout the summer and on Labor Day with special attention to Vietnam veterans.

Comment: Mark Chambers provided greetings from his wife, Janine Chambers, who is recovering from surgery and could not be here. Janine wanted to ask that the church consider recognizing and honoring indigenous people and expressing land acknowledgements. Janine would like the church to consider creating a statement acknowledging indigenous people and the land that was taken from them and putting it on a marker outside of the church.

#### **Adjournment:**

Tom Briscoe moved to adjourn FUSM's 2022-23 annual meeting. Mike Hogan seconded.

The meeting was adjourned at 2:22pm.

# 2023 - 2024 CHURCH LEADERSHIP

## CONGREGATION OFFICERS

**PRESIDENT**  
Patricia Geenen

**VICE PRESIDENT**  
Stacy Koenen

**SECRETARY**  
Joe Riepehoff

**TREASURER**  
Tom Briscoe

## BOARD MEMBERS

George Bledsoe (2021-24)  
Dana Brooks (2023-26)  
Patricia Geenen (2021-24)  
Tony Panciera (2021-24)  
Sarah Richards (2022-25)  
Joe Riepenhoff (2022-25)  
Stacey Koenen (2023-2026)  
Stacey Thieme (2023-2026)  
Amy Wilbourne (2022-25)

## NOMINATING COMMITTEE

Jane Cliff, Co-Chair  
Susie Seidelman, Co-Chair  
Anne Alexander  
Jason Luedtke  
Michael Pointer Mace

## 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

Tammy Hilgeman  
Megan Smith  
Thea Watters  
Adam Zaiger  
Rev. Kimberlee Tomczak Carlson

### CHRONOLOGICALLY GIFTED

Juliet Hills  
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

Scot Henry  
Lynne Jacoby, Membership & Dev't.

### FINANCE

Noreen Gilbertsen  
Jean Johnson, Dir. of Admin.

### FORUM

Lorraine Jacobs  
Mark Mueller

### GALLERY

Jeff Percy  
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

Dave Hoover  
Laurie Petersen  
Steve Sieck, Ministerial Intern  
Ben Trubach  
Lynne Jacoby, Membership & Dev't  
Rev. Dena McPhetres

### MORTER LECTURE

Rev. Jennifer Nordstrom

### OWL TEACHERS

Deb Solis, Youth Program Coord.

### PASTORAL CARE ASSOCIATES COORDINATOR

Jeri Percy through Dec 2023  
Lynn Connolly as of Jan 2024

### PASTORAL CARE PROVIDERS COORDINATOR

Liz Irwin Moore

## **PERSONNEL**

Amanda Panciera  
Rev. Jennifer Nordstrom

## **PLEDGE DRIVE**

Kathy Donius  
Rev. Jennifer Nordstrom

## **POETRY GROUP**

Diane Horne

## **PULPIT GUEST**

Rev. Dena McPhetres

## **SABBATICAL COMMITTEE**

Eric Heilig  
Rev. Jennifer Nordstrom & Rev. Jim Foti

## **SHAWL MINISTRY**

Patti Agacki  
Connie Georgenson

## **SUNDAY FLOWERS**

Shari Wright, Office Mgr.

## **SWANS (Seasoned Women Are Naturally Social)**

Barbara Collignon

## **THEME CIRCLES**

Rev. Dena McPhetres

## **USHERS**

Cheri Briscoe  
Lynne Jacoby, Membership & Dev't  
Steve Sieck, Ministerial Intern

## **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  
Treenut Wilson

### **COMMON GROUND**

Jerry Fredrickson

### **GUEST HOUSE SHELTER**

Thea Waters  
Elizabeth Lentini

### **INTERCHANGE FOOD PANTRY**

Tim Ottman  
Beth Bruch

### **INTERFAITH CONFERENCE OF GREATER MILWAUKEE**

Patricia McFarland

### **MICAH (Milwaukee Inner-city Congregations Allied for Hope)**

Pat McFarland  
Bob Monahan

## **SOCIAL JUSTICE COUNCIL**

Rev. Jennifer Nordstrom

### **BLACK LIVES MATTER 2 WI UUs**

Kenyatta Yamel

### **DEFEND DEMOCRACY**

Pete Koneazny  
Pat McFarland  
Juanita Mast  
David Umhoefer

### **EARTH JUSTICE MINISTRY**

Bruce Wiggins  
Barbara Leigh

## **SHARE THE PLATE**

Bob Monahan  
Nancy Spransy

## **WUUSAN**

Juanita Mast  
Dan O'Keefe

## **OTHER LEADERS**

### **THEME CIRCLE FACILITATORS:**

#### **Rev. Dena McPhetres**

Nancy Cross Dunham  
Lisa Gies  
Kari Gunderson  
Candice Haight  
Diane Horne  
Angie Mason  
Jen Murray  
Patricia McFarland  
Nancy Spransy  
Amy Wilbourne  
Pam Wilkie

### **PASTORAL CARE ASSOCIATES:**

#### **Rev. Dena McPhetres**

Bob and Sue Austin  
Lynn Connolly  
Deborah Conta  
Jean Groshek  
Joan Hansen  
Melinda Vernon

# 2023-2024 Sermon Schedule

## **JUNE 4**

“Flower Ceremony: A Special Kind of Happiness ”  
The Rev. Dena McPhetres

## **JUNE 11**

“What Jesus Said About Being Gay”  
Rev. Tony Larsen

## **JUNE 18**

“It’s Juneteenth! ”  
Rev. Kimberlee Tomczak Carlson

## **JUNE 24**

“When Delight Breaks Through”  
The Rev. Dena McPhetres

## **JULY 2**

“Grace-filled Gatherings ”  
Rev. Omega Burckhardt, Pulpit Guest

## **JULY 9**

“Grace and Gratitude”  
Rev. Jim Foti

## **JULY 16**

“Grace Period. Grace. Period.”  
The Rev. Dena McPhetres

## **JULY 23**

“Everyday Poetry: Why poetry? Why now?”  
Paul Kosidowski & Sally Lewis,  
Members

## **JULY 30**

“Practicing Grace”  
The Rev. Dena McPhetres

## **AUGUST 6**

“Radical Kinship ”  
The Rev. Dena McPhetres

## **AUGUST 13**

“How Do You Ken Your Kin? ”  
The Rev. Dena McPhetres

## **AUGUST 20**

“Showing up Imperfect ”  
Annie Wegner LeFort, Member

## **AUGUST 27**

“The Last Dance”  
Jeff Percy, Member

## **SEPTEMBER 3**

“Kool Aid Mustache & Tears”  
Amanda Panciera, Member

## **SEPTEMBER 10**

“Welcome Is Not a Mat”  
Ingathering Sunday  
The Rev. Jennifer Nordstrom

## **SEPTEMBER 17**

“The Welcome Table”  
The Rev. Jennifer Nordstrom

## **SEPTEMBER 24**

“Welcoming People’s Wholeness”  
Rev. Nontombi Naomi Tutu  
The Rev. Jennifer Nordstrom

## **OCTOBER 1**

“Building on Love ”  
The Rev. Dena McPhetres

## **OCTOBER 8**

“What Do We Do with the Painful Stuff?”  
The Rev. Jennifer Nordstrom

## **OCTOBER 15**

“Growing Ourselves from Seed”  
The Rev. Dr. Sophia Betancourt

## **OCTOBER 22**

“How Do We Carry Our Histories?”  
The Rev. Jennifer Nordstrom

## **OCTOBER 29**

“Passing Away, Passing It On”  
The Rev. Dena McPhetres

## **NOVEMBER 5**

“The Selfishness of Generosity”  
The Rev. Jennifer Nordstrom

## **NOVEMBER 12**

“Generosity Builds Community ”  
The Rev. Jennifer Nordstrom

## **NOVEMBER 19**

“Givers and Receivers”  
Rev. Kimberlee Tomczak Carlson

## **NOVEMBER 26**

“Thanks, I Guess?”  
Steve Sieck, Ministerial Intern

## **DECEMBER 3**

“Hope in the Unknown”  
The Rev. Jennifer Nordstrom

## **DECEMBER 10**

“The Beginning, The End, and Us In Between ”  
The Rev. Jennifer Nordstrom

## **DECEMBER 17**

“The Mystery of Holiday Lights”  
Holiday Pageant  
The Rev. Kimberlee Tomczak Carlson

## **DECEMBER 24**

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

## **DECEMBER 31**

“I Hereby Resolve”  
Steve Sieck, Ministerial Intern

## **JANUARY 7**

“Love Is a Field of Diplomacy ”  
The Rev. Dena McPhetres

## **JANUARY 14**

“What If All Children Are Our Children?”  
The Rev. Jennifer Nordstrom

# 2023-2024 Sermon Schedule

## **JANUARY 21**

“What’s Love Got to Do with It?”  
The Rev. Kimberlee Tomczak Carlson

## **JANUARY 28**

“A World of Mutual Thriving”  
The Rev. Jennifer Nordstrom

## **FEBRUARY 4**

“Justice Is an Issue of Faith ”  
The Rev. Jennifer Nordstrom

## **FEBRUARY 11**

“Even a Fist Was Once an Open Palm”  
Steve Sieck, Ministerial Intern

## **FEBRUARY 18**

“Fight Despair with Community”  
The Rev. Jennifer Nordstrom

## **FEBRUARY 25**

“Asking the Big Questions”  
Annual Youth Service  
The Rev. Kimberlee Tomczak Carlson

## **MARCH 3**

“Transformation Is a Process ”  
The Rev. Jennifer Nordstrom

## **MARCH 10**

“The Arc Bends Because People Bend It”  
The Rev. Jennifer Nordstrom

## **MARCH 17**

“In Between”  
The Rev. Dena McPhetres

## **MARCH 24**

“Learning Changes Us ”  
The Rev. Jennifer Nordstrom

## **MARCH 31**

“We Don’t Know How It All Turns Out ”  
The Rev. Jennifer Nordstrom

## **APRIL 7**

“Interdependence Is a Given”  
The Rev. Dena McPhetres

## **APRIL 14**

“Life and Death Are Twinning ”  
The Rev. Jennifer Nordstrom

## **APRIL 21**

“Climate and Democracy and Ancient  
Zombie Viruses, Oh My! ”  
The Rev. Jennifer Nordstrom

## **APRIL 28**

“The Myth of the Rugged Individual”  
The Rev. Jennifer Nordstrom

## **MAY 5**

“You Are a Piece of the Truth ”  
The Rev. Jennifer Nordstrom

## **MAY 12**

“All Kinds of Mothers and Not ”  
The Rev. Dena McPhetres

## **MAY 19**

“Religious Education Sunday 2024 ”  
The Rev. Kimberlee Tomczak Carlson

## **MAY 26**

“On Fascism and Pizza ”  
Steve Sieck, Ministerial Intern

## **JUNE 2**

“Flower Ceremony: The Power & Beauty  
of the Present”  
The Rev. Dena McPhetres  
The Rev. Jennifer Nordstrom  
The Rev. Kimberlee Tomczak Carlson

# Wheel of Life

## May 10, 2023 - May 14, 2024

### Deaths

Janet Fitch  
Margo Frey  
John Hagedorn  
Nelson Kading  
Loren Leys  
Lisa Marie Noble  
Marlowe Nortrom  
Dan O'Keefe  
Max Scharmach  
Patricia Scharmach

### Dedication of Parents And Children

November 19, 2023

Samus Donahue Schueler  
Tycho Schueler Donahue  
*Children of Amy Donahue*

Paul Austin Dahlinghaus Eierman  
*Child of Lauren Eierman  
& Ian Dahlinghaus*

Aristotle Auster Kegel  
*Child of Katie & Noel Kegel*

Ellis Wren Mostar Rummler  
*Child of Nick Rummler & Carley Mostar*

### Dedication of Parents And Children

May 12, 2024

Natalie Layde  
John Layde  
*children of Suzie Considine & Kevin Layde*

Roran Frederick Wolff-Berkeley  
Calvin Theodore Wolff  
Oliver Richard Wolff

*children of Mikai Wolff & Kelsey Rourke*

### New Members

#### Fall 2023

Vince Bushell  
Jane Collis-Greers  
Amy Donahue  
Chloe Dummond  
Diane Jakubowski  
Laura Parrino  
Jill Potkay  
Barbara Todd  
Leon Todd  
Andrew Whitver

#### Winter 2024

Kurt Baehman  
Traci Clark  
Cecelia Cross  
Laurie Foss  
Mariah Kauder  
Michael Kirsch  
Elinor Kostic  
Mark Kostic  
Jennifer Miescke  
Tom Pachner  
Bill Pederson  
Jon Darron Walker  
Amanda Werhane  
Amanda Zakrzewski  
Billy Zakrzewski

#### Spring 2024

Richard Baldwin  
Debbie Bork  
Neal Bork  
Brenda Bulinski  
Beth Finseth  
Taylor Finseth  
Steve Gravatt  
Elizabeth Hayes  
Wendy Humphries  
Young Kim  
Ted Kraig  
Ann Ritchey  
Kelsey Rourke  
Andrew Stone  
Mikai Wolff

# 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  
Drew Kennedy & Lois Wesener  
Tina Keppel  
Pete & Lisa Koneazny  
Hank Kulesza  
Adele Kaferly  
Bob Moore & Liz Irwin Moore  
Mark & Lonni Mueller  
Ellyn & Mike Newman  
Janet Nortrom  
Mimi Notestein  
Patrick & Barbara Patterson  
Holly Patzer  
Kathy & Bob Porter  
Linda Presto  
Tom Radoszewski

Michael Radtke  
Miriam Reading  
Kathy Rivera & Sally Lewis  
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

#### Rev. Jennifer Nordstrom

I have loved my return-from-sabbatical year with you. We celebrated together, did good spiritual deepening work, and found a new rhythm. We've had more and more members returning to regular attendance after the pandemic, and the wonderful arrival of new people. There has been a great deal of staff change, and our Board of Trustees has been working hard with the Endowment Fund Task Force to set up a Trust for our Forge Our Future funds.

#### WORSHIP

Our full "to date" attendance is 315 (this counts the people who attend in person and online live Sunday morning, as well those who watch Sunday's online service later in the week). Our live attendance (in person + online live Sunday morning) is 232. It is exciting that our full to date attendance is now a little higher than our pre-pandemic average. Our average live attendance is still lower than our pre-pandemic average, but with vastly changing attendance patterns for faith communities across the country it is not concerningly so. Rather, we should keep learning from peoples' desire for both live, synchronous experiences \*and\* asynchronous opportunities to connect.

#### STAFF

Our staff team has moved through a lot of change and transition this year, rising to the occasion to support the congregation and one another through celebration, tragedy, expense reductions, increased workload, and life transitions. First, our new Ministerial Intern, Steve Sieck joined us in September, fulfilling congregational hopes of returning to the work of ministerial formation. Shortly thereafter, our beloved Choir Director Tristan Strelitzer was in a terrible car accident, and the music staff especially stepped up to create resilience in the system that would allow Tristan to be gone for the fall to heal and be with his family. Then our dear Membership Development Coordinator Lynne Jacoby resigned, and we made the difficult decision not to fill her position to reduce expens-

es. Associate Minister Rev. Dena McPhetres took on the membership portion of her position, with support from Ministerial Intern, Steve Sieck, Youth Programs Coordinator Deb Solis, and Office Manager Shari Wright, along with the Membership Team. Senior Minister Rev. Jennifer Nordstrom took on the development portions of her position, with significant leadership and support from Shari Wright, and the Pledge Team. In the Spring, both our Religious Education Coordinator, Kaitlin Barron, and our Youth Programs Coordinator, Deb Solis, announced that they were leaving. Kaitlin is moving with her partner for new opportunities after a year of service, and Deb is retiring after 10 years of service. We combined portions of each position to create a new staff role, the RE and Membership Coordinator, and hired Fiona Higgins to fill the position. Finally, we celebrated Rev. Kimberlee Tomczak Carlson's achievement of Final Fellowship, which is a ministry achievement similar to tenure. She will continue as our Minister of Religious Education, but with less paperwork to submit for national evaluation of her work.

#### BOARD OF TRUSTEES AND ENDOWMENT FUND

The Board of Trustees has been hard at work this year supporting the Endowment Fund Task Force (EFTF) and doing the work to execute the Trust that will hold our Forge Our Future funds. They have spent hours digging into the legal and financial realities of setting up this fund, giving their labor to the congregation of today and generations to come. The generosity of our Board, our EFTF, and all the people who gave so generously to the Fund will support the ministry of future generations of First Church folks showing up to nurture the spirit, engage the mind, and inspire action.

#### IN CLOSING

Our congregation has dug into its purpose this year with renewed vitality and strength, as people have come together to care for one another, discern and return to their values, and make meaning of these times. I continue to be grateful to be in the work with the people of First Church. We are stronger together.

With love,  
Jennifer



# Staff Reports

## SOCIAL JUSTICE COUNCIL

In fall the member teams of the Social Justice Council voted to collaborate on the shared priority of elections and defending democracy. Their work has included a Democracy Day on Jan 7, where more than 100 FUSM members and friends heard about how to get involved in the work of democracy from various organizations around Milwaukee, and 80 people signed up for democracy work! The Defend Democracy team has also led FUSM members to: get trained in voter registration (30 people); write ~500 letters encouraging Wisconsin Voters to vote; and the Earth Justice Ministry Team led FUSM members to write ~1000 postcards encouraging environmental voters to vote.

The FUSM Social Justice Council unanimously endorsed MICAH's "We All Belong" campaign statement on April 17, 2024, and invited the FUSM Board of Trustees to consider doing so at their May meeting, following the lead of the Milwaukee Common Council. MICAH is hosting a We All Belong rally for democracy on July 14, 2024, preceding the Republican National Convention in Milwaukee.

First Church members and friends have also participated in and supported various ad hoc social justice actions. On August 8, we gathered with about 75 people to counter-protest a planned anti-trans protest of a trans clothing swap hosted by our justice partners at Zao-MKE Church. On Aug 23, First Church folks gathered with other Unitarian Universalists and progressive clergy to insist on the right to contraceptive care in Wisconsin during the Republican National Debate held at the Fiserv Forum.

Rev. Jennifer has been doing bridge-building relational work in interfaith spaces, and having 1-1 conversations with local Jewish, Muslim, and Christian colleagues. She said a prayer for the journalists who have been killed in Gaza at a Nov 17 event, lead a litany of mourning for the children who have been killed in Israel and Palestine on Dec 8, and gave a prayer mourning the loss of life in Israel and Gaza at a Jan 7 Interfaith event—the first Interfaith event in Milwaukee since Oct 7. Rev.s Jennifer, Dena, and Kimberlee all signed the first Milwaukee Interfaith statement calling for a ceasefire, and Rev. Jennifer attended the press conference announcing it on Thursday, Jan 18. FUSM members and friends have showed up in numbers to these events, expressing our lament and holding our neighbors in care.

In the Social Justice Council, a new Trans Justice Team joined the Council, our Cathedral Center team has a new leader (Treenut Wilson), and our Circles of Support and Black Lives Matter teams have gone on hiatus. The Trans Inclusion class Rev. Dena ran through the fall has spun off into three groups: an education team, which will offer classes to the congregation on Trans and LGBTQ inclusion; an action team, which will focus outward, particularly on anti-trans legislation in Wisconsin; and a change team, which will coordinate welcome, inclusion, and leadership efforts in the church.

## ANTI-RACISM TEAM

The Anti-Racism Team has been busy this year, with a powerful visit from Rev. Nontombi Naomi Tutu kicking off the year in September, an Indigenous Peoples' Day service in October, an MLK Service Day at The Table in January, and an Anti-Racism Training for First Church team leaders in March.

On Saturday, September 23, the Team hosted the Irma Morter Lecture with Rev. Nontombi Naomi Tutu speaking about, "We Must Ask Again: Where To Now, Community or Chaos?". About 100 people were in attendance in person, and another 92 online. We had a number of visitors to the event, and a lovely reception afterwards highlighting our Black, Indigenous, and People of Color (BIPOC) Vendors and Vendor Guide. Rev. Tutu preached the Sunday service on September 24, 2024.

On Monday, Jan 15, MLK Day, over 20 First Church members joined the Anti-Racism Team at "Beloved Community Day" at The Table, where local organizations gather with community members to connect and build relationship. First Church received a tour of The Table from Venice Williams, engaged in some of the games and relationship-building activities, and served lunch. Our members really enjoyed it, felt connected and part of something larger, and had a feeling of being of use. Venice expressed an interest in building a more long-term relationship with us in the future.

The Anti-Racism Team's "Building Health Multicultural Community" training with Nurturing Diversity Partners on Saturday, March 9, from 9am – 12:30pm was a big success! We had major Board leadership, as well as at least 2 representatives from the Finance Team, Nominating Committee, the Pastoral Care Associates and Trainers, Children's Reli-

# Staff Reports

gious Education, Social Justice, Worship Associates, Membership and Ushers, Trans Inclusion, Forum, and Share the Plate. Each team has sent me how they rated their team or committee on the Anti-Racism Rubric, as well as one thing they plan to do to move their team one step forward on the rubric. The team is planning an August follow up event with the same leaders to reflect on the one thing they planned to do to move the team forward.

## DENOMINATIONAL AFFAIRS

The 2024 General Assembly (GA), Thursday, June 20 through Sunday, June 23, is historic, because the vote on the Article 2 bylaws will change our Unitarian Universalist Principles and Purposes. We have 13 delegate slots, which will likely be filled by seven members of the Board of Trustees and six lay leaders.

Article II is the section of the UUA Bylaws that includes our Unitarian Universalist Principles (ie, “the inherent worth and dignity of every human being...”) and Purposes. Last year, delegates to General Assembly voted on a revision of Article II. Prior to the vote, the Denominational Affairs Team spent the year offering workshops to FUSM participants, gathering feedback on our UU principles and purposes, and educating them about the process. We submitted that feedback to the UUA as part of their stakeholder engagement process.

This year at GA, delegates will vote for a second time on proposed revisions to Article II. The Article II Study Commission completed the final draft of its proposed revisions to Article II, which you can find here: [https://www.uua.org/files/2023-10/a2\\_final\\_line\\_num\\_10312023.pdf](https://www.uua.org/files/2023-10/a2_final_line_num_10312023.pdf). There are likely to be several amendments to be voted on at GA, so the final wording may be different than the current wording. You can read more about the process here: <https://www.uua.org/uuagovernance/committees/article-ii-study-commission/final-proposed-revision-article-ii>.

Senior Minister Rev. Jennifer Nordstrom continues to serve our faith as the President of the Senior Ministers of Large UU Congregations, working with the Senior Ministers on covenant, leadership, finances, and vision. Associate Minister Rev. Dena McPhetres has been serving our faith as Good Officer, supporting congregations and ministers in conflict.

## ADDITIONAL INFORMATION ON ARTICLE II TO BE UPDATED AT GA THIS SUMMER

Michelle Boehm, Article II Team Member

What are our UU values? The Seven Principles we know so well were written and adopted in the 1980s and now it's time to update them per our bylaws. The national Article II Study Commission spent two years holding meetings and workshops with UUs from around the country, which our congregation participated in. After discussion and a first vote at the General Assembly (GA) in 2023, the Article II Commission made their final recommendation in October of 2023 (see below). There will be discussion and a vote at the virtual GA this summer (June 20-23). Once any amendments have been resolved, a 2/3 approval vote is required to adopt a new version of Article II that will be in place for the foreseeable future.

We strongly encourage everyone in our congregation to read the whole proposal and amendments because this is a significant change to the Seven Principles.

The shared values name LOVE as central, surrounded by Justice, Equity, Transformation, Pluralism, Interdependence and Generosity. Looking for a way to remember these shared values? Think JET PIG. Picture a pig with a jetpack on its back and a heart on its chest. You're welcome!

The Article II proposal is subject to amendment in 2024 only by a three-fourths vote in favor of an amendment submitted to the General Assembly. Four amendments met the approval criteria for voting and will be considered on the floor for the 2024 General Assembly:

1. Peace as a UU Value – this would add Peace to the list of UU Values and Covenants
2. Reason as a UU Value – this would add Reason to the list of UU Values and Covenants
3. Equity Rewrite (Wheeler Amendment) – this would make updates to the wording of the 1st sentence of the existing Equity Value
4. Equity Rewrite (Steebins Amendment) – this would add a 3rd Sentence to the existing Equity Value
5. Links: · Equity Rewrite (Wheeler Amendment) · Equity Rewrite (Steebins Amendment)

## ARTICLE II PURPOSES AND COVENANT

Section C-2.1. Purposes

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The Unitarian Universalist Association will devote its resources to and use its organizational powers for religious, educational, and humanitarian purposes. Its primary purposes are:

- to assist congregations in their vital ministries,
- to support and train leaders both lay and professional,
- to foster lifelong faith formation and spiritual development,
- to heal historic injustices,
- to support and encourage the creation of new Unitarian Universalist communities, and
- to advance our Unitarian Universalist values in the world.

The Unitarian Universalist Association will actively engage its members in the transformation of the world through liberating Love.

## Section C-2.2. Values and Covenant

As Unitarian Universalists, we covenant, congregation-to-congregation and through our Association, to support and assist one another in our ministries. We draw from our heritages of freedom, reason, hope, and courage, building on the foundation of love.

Love is the power that holds us together and is at the center of our shared values. We are accountable to one another for doing the work of living our shared values through the spiritual discipline of Love.

Inseparable from one another, these shared values are:

## Section C-2.3. Inspirations

Direct experiences of transcending mystery and wonder are primary sources of Unitarian Universalist inspiration. These experiences open our hearts, renew our spirits, and transform our lives. We draw upon, and are inspired by, sacred, secular, and scientific understandings that help us make meaning and live into our values. These sources ground us and sustain us in ordinary, difficult, and joyous times. We respect the histories, contexts, and cultures in which these sources were created and are currently practiced. Grateful for the experiences that move us, aware of the religious ancestries we inherit, and enlivened by the diversity which enriches our faith, we are called to ever deepen and expand our wisdom.

## Section C-2.4. Inclusion

Systems of power, privilege, and oppression have traditionally created barriers for persons and groups with particular identities, ages, abilities, and histories. We pledge to replace such barriers with ever-widening circles of solidarity and mutual respect. We strive to be an Association of congregations that truly welcome all persons who share our values. We commit to being an Association of congregations that empowers and enhances everyone's participation, especially those with historically marginalized identities.

## Section C-2.5. Freedom of belief

Congregational freedom and the individual's right of conscience are central to our Unitarian Universalist heritage. Congregations may establish statements of purpose, covenants, and bonds of union so long as they do not require that members adhere to a particular creed.

For more information, please see these links:

Final Proposed Revision to Article II: [https://www.uua.org/uuagovernance/committees/article-ii-study-commission/final-proposed-revision-article-ii?](https://www.uua.org/uuagovernance/committees/article-ii-study-commission/final-proposed-revision-article-ii?fbclid=IwAR36UZqXjidzimHXiVSPyncaRpEuQ-3uUSi1eGLPJLpktopvFyqQhVhmrMbc)

[fbclid=IwAR36UZqXjidzimHXiVSPyncaRpEuQ-3uUSi1eGLPJLpktopvFyqQhVhmrMbc](https://www.uua.org/uuagovernance/committees/article-ii-study-commission/final-proposed-revision-article-ii?fbclid=IwAR36UZqXjidzimHXiVSPyncaRpEuQ-3uUSi1eGLPJLpktopvFyqQhVhmrMbc) Why Unitarians are Reexamining Article II: <https://www.uuworld.org/articles/mcdonald-a2qa>

More information on the Article II Study Commission: <https://www.uua.org/uuagovernance/committees/article-ii-study-commission>

## PLEDGE TEAM

Pledge Team Members: First Church Staff- Jennifer Nordstrom and Shari Wright, and First Church members - Kathy Donius (chair), Bizzy Schultz, Mark Richards, Pat Hidson, Adam Zaiger, Jacki Zandi and Pat McFarland.

Goal: The Pledge Team set an ambitious goal this year to grow pledge income by 10% over last year's budgeted pledge income of \$728,500, or a pledge drive total of approximately \$800,000 in pledges. This goal was informed by the level of annual pledge income that is necessary for us to become a pledge sustained community.

Our Pledge Drive theme this year was "Generosity Creates Community" and we celebrated the fact that our First

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Church community nurtures our spirits, forges meaningful and supportive connections, and challenges us to make a positive and lasting impact in our world. We used puzzle making to symbolize the importance of every individual to the whole and emphasized that it is our collective annual investment in First Church that makes everything that First Church does possible.

**Outcome:** As of April 27, we are projecting a final pledge drive total of approximately \$761,872 in pledges. This amount falls short of our 10% goal but represents approximately a 2.4% increase in pledges compared to last year's budgeted pledge income. Thank you to everyone who pledged!!

Many of our pledging households increased their pledge this year and many of our members met our ask for a 10% increase. However, most of our pledging households renewed their pledge at current levels and a small percentage of our pledging households decreased their pledge commitment. Every pledge matters and we are grateful to everyone who made a pledge during the pledge drive. We also cannot overemphasize the importance of pledging during the annual pledge drive because our annual budget is determined, in large part, by our projected annual pledge income from the pledge drive. As of April 27, we still are following up with nearly 20% of our pledging households to confirm their pledge for next year. The Pledge Team urges any members who did not respond during the pledge drive to make your pledge now.

**Opportunity:** Our annual pledges range from \$36.00 to \$29,000 per year and our average household pledge is \$2050.00 per year. When we prorate last year's budgeted expenses across our member households, the cost of everything that First Church provides to its members and the broader community is approximately \$1650 per individual member. We know not everyone can manage giving at this level, but these numbers highlight the importance of giving more if you can as well as our continued opportunity to grow our First Church membership and increase our average annual pledge moving forward.

**Pledge Team Thanks.** Special thanks to our Pledge Team members, our visiting stewards Bob Balderson, Mark Miller, Julie Hamrick, Kathy Rivera, Sally Lewis, Mark Chambers

and Pete Koneazny and our Testimonial Speakers Tristan Strelitzer, Max Larson, Ann Alexander and Jeff Percy. We are so grateful to you for contributing your time and talent to helping us sustain our First Church community.

## ASSOCIATE MINISTER

### Rev. Dena McPhetres

This was another big year at First Church! We successfully completed the work of covering Rev. Jennifer's responsibilities and joyfully celebrated her return from sabbatical on August 1. We continue to welcome familiar faces as folks return to church life after the pandemic. And there is a steady stream of guests each Sunday as more people find this vibrant spiritual community!

## ADULT SPIRITUAL DEVELOPMENT

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

- Connect & Reflect group concluded their weekly meetings at the end of October, after serving as a lifeline for many members during the pandemic years.
- Poetry Contemplation group has 31 people on their list with average attendance 12-15 participants weekly. A team of six lay leaders rotate facilitation.
- The Practice of Silence, a new opportunity to gather in the Sanctuary for silent meditation on Second Monday evenings began in February, facilitated by member Andrew Whitver.
- The Silent Retreat was resurrected by member Sarah Fowles, held at Cedar Valley Retreat Center the last weekend in April.
- Theme Circles completed its sixth 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. Participants make a commitment to attend once a month October – June. Regular Theme Circles served 39 members and friends, plus 7 Facilitators in 6 circles this year.
- We added 2 new "UU Writers" Theme Circles as a pilot program, serving 10 members and friends, plus 3 facilitators. We plan to open UU Writers theme circles to the congregation next year.
- Working with Rev. Kimberlee, we added a Parents'

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- Theme Circle, serving 10 members, plus 2 facilitators.
- A total of five new facilitators joined our team. Theme Circles served a grand total of 59 people, plus 11 facilitators. Registration for next year begins September 1.
- A pilot Tillich Discussion Group met once a month for 8 months with ten participants, studying theologian Paul Tillich's book "The Courage to Be" under the guidance of member Dennis Conta.
- A pilot Trans Inclusion in Congregations class met twice a month for 3 months using the curriculum from Transforming Hearts Collective, facilitated by me and Amy Horst. We had 13 participants, including six staff members.
- UU Wellspring "Sources" group, in its third year, met twice a month for 10 months with 8 participants, facilitated by Diane Horne and Ryan Pawlowski. 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. We hope to expand UU Wellspring next year, offering their new group "Love at the Center."

## MEMBERSHIP

Membership came into my portfolio in November, when our much-loved Membership Development Coordinator Lynne Jacoby resigned, and we did not refill the position. Assisted by part-time staff Deb Solis and Steve Sieck, Ministerial Intern, full-time Office Manager Shari Wright, and an enthusiastic Membership Team of nine lay leaders, we regrouped and redistributed the membership ministry.

The Membership Team meets monthly to brainstorm, create, and support courageous and accessible welcome and engagement for our guests and members. They support our Journey to Membership classes, New Member Ceremonies, and Pizza Nights three times a year. We implemented Lynne's idea to focus our energy into two sub-teams for deeper thought and productivity: the Welcome Team and the Member Engagement team.

The Welcome Team (Ben Trubach, Steve Sieck, Jeanne Kowalski, Rod Botts) improved our signage, cultivated a welcoming culture among the ushers and greeters, and adjusted the landing place near the Guest Table in coffee hour. Gratitude to Deb Solis for staffing our Greeter Lectern each Sunday with her big smile. Huge thanks to Steve Sieck for coordinating the usher teams and supporting them with

weekly emails. The Member Engagement Team (Dave Hoover, Laurie Petersen, Paula Anderson, Sharon DePue, Kathy Rivera, and first half of the year Karen Block) makes phone calls to guests who fill out Visitor cards and is building a foundation for a New Member Mentor program.

- We currently have 632 adult members and 34 pledging friends.
- We welcomed 40 new members since last Annual Report (ten more than last year), with robust attendance during our three Journey to Membership sessions.
- 82 members resigned or were withdrawn by us since last Annual Report, due to a thorough clean-up of the membership rolls this year. Last summer, emails and letters were sent to members who did not pledge or financially contribute in the past 2 ½ years, offering an opportunity to request a waiver or make a pledge per First Church policy.

## PASTORAL CARE

The support we give and receive from each other, both formal and informal, makes a world of difference to our well-being as individuals, families, and as a community.

Our team of seven Pastoral Care Associates (PCAs) are in their third year of service, offering 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. Jeri Pearcy retired from serving as PCA Coordinator, concluding a three-year term. Lynn Connolly began serving as PCA Coordinator in December. PCAs made multiple contacts with 30 members since last April. Rev. Jennifer, Rev. Kimberlee, Steve Sieck, Ministerial Intern, and I made at least 152 pastoral care contacts with members.

The PCA team and I recruited applications from members for a new team which will be trained in fall 2024. The bulk of my work this summer will be re-designing the training (again!) to be held in-person. We delivered 13 shawls and lap robes, 6 children's shawls and one baby blanket from our Shawl Ministry.

Our Pastoral Care Provider (PCP) Team of church members provide practical help for short term needs. There are 33 members who are available to serve as PCPs. Since last April, 10 Providers responded to requests. 3 households

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received several meals each. Rides were provided to 4 people. Grocery shopping was done for 2 people, and laundry was done for one. Many thanks to Liz Irwin Moore, our PCP Coordinator.

Our Memorial Service Reception Team was reconstituted this year, with Jacki Zandi and Terry Wiggins, co-coordinating.

## 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. Seasoned Women Are Naturally Social (SWANS) began gathering again this winter. 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.

## 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 2023, including 2 services led by Assistant Sabbatical Minister Rev. Jim Foti, 5 services led by me, 1 summer clergy pulpit guest, and 1 Sabbatical clergy pulpit guest. We enjoyed 4 services led by church members.

## DENOMINATIONAL AFFAIRS

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

## CONCLUSION

First Church is full of energy! May we continue to celebrate life in its fullness, open our doors and hearts wider, and nourish the spirits of all who seek a home here. Thank you for the honor and joy of serving First Church.

Yours,

Rev. Dena

## ADMINISTRATION

### DIRECTOR OF ADMINISTRATION

#### Jean Johnson

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 me, publications and communications.

This year, with Membership & Development Coordinator Lynne Jacoby leaving and her position remaining vacant, Shari stepped up in a big way to assist in areas of Lynne's work. In membership, she helped Rev. Dena establish systems for staff and Membership Team volunteers, which can be supported by our church management software. In development, Shari supported wrap-up of the Feast For Funds auction as well as worked closely with the Pledge Team to provide a lot of data to help with strategy and follow-up, brochure layout, and forecasting the outcome as the pledge drive finished.

I am enormously grateful for Shari's expertise, outstanding dedication to the church and our work, and her care for our church community.

#### INFORMATION TECHNOLOGY

The IT Team is led by Office Manager Shari Wright and the members are Steve Culver, Allan Ries, and a new member Laurie Foss. The IT Team didn't have any projects to

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change our current network that was set up to a cloud-based network in 2022. With the success of a cloud-based network, this year the IT Team shut down old servers in the bunker room. There were a few network problems outside of our church that affected our Internet access, but it was restored within 24 hours. Late spring of 2023, the IT Team upgraded our failing 2014 phone system to a VOIP system.

In the next year, the IT Team will continue to oversee our computer network and work with our IT management services company, TSR Solutions. The biggest issue for our network infrastructure is the potential for security breaches. We anticipate some of our network equipment will be upgraded to keep our network very secure and change our personal computer security solution based on the best practices today.

## FACILITIES HIGHLIGHTS

Facilities Manager Ken Liddell has been responsible for managing building use and directing our friendly and capable Facilities Assistant Jim Spice and Facilities Maintenance Worker Nate Jackson. Ken managed 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.

Unfortunately, Ken struggled with health issues this winter and I've taken over his responsibilities in his absence. In addition to being very skilled and experienced, Ken has been a joy to work with. I look forward to his return this summer.

Ken, the B&G Team, and I have done some important projects this year. Highlights include: engaging a local company to replace and monitor our 1999 security alarm system, repairs to the main entrance doors which will be replaced this summer, and several repairs and maintenance of our HVAC systems which are the most complex building systems we have.

It is remarkable this church year how all of our teams and groups are back to full strength and using the church buildings very regularly. Meetings have also required more technology than before the pandemic as we remain committed to offering video conferencing to those who

cannot come to the church buildings. Wonderful special events and groups the staff supported include: Rev. Tutu's Morte Lecture, Rev. Betancourt's visit, a national LREDA lecture and reception, multi-day regional Youth Conference, four March Interfaith Conference lectures with lunch, hosting the UUA's Organizing and Strategic Team's three-day retreat, and the memorable House Band concert. Finally, we've added hosting the weekly meeting of Transbenderz, a transgender and gender non-conforming oriented addiction recovery group.

Facilities Assistant Jim Spice has handled them all with flexibility, warmth, and grace. Jim provides a friendly and secure welcome at the front door; setup and take down of furniture, equipment, and AV; brews gallons of coffee and sanitizes mounds of dishes; answers your questions and helps you run your technology needs. I'll note that during the pandemic we reduced Facilities Assistant hours from 37 to 25 per week, and Jim works all 25. Thank you, Jim!

## FINANCE OPERATIONS HIGHLIGHTS

Financial systems operated smoothly this year. Working with Office Manager Shari Wright and our outside 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; operating pledge payments have been strong this year. A huge thank you to the Finance Team, led by chair Noreen Gilbertsen, for their knowledgeable and constant service to First Church. I've learned so much from each of you. Please find a financial report from Noreen in this annual report.

Forge Our Future Endowment pledge payments have been steady—over \$1,481,000 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 Trustees. We follow a process for transferring these special contributions each month after reconciliation with database contribution records. See a report from the Forge Our Future Endowment Trustees and Task Force in this annual report.

With the help of church member and CPA Andy Larson, we submitted to the IRS an Employee Retention Credit

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application for approximately \$155,000; it may take about one year to receive these funds. The Finance Team developed for the Board of Trustees, flowcharts of our income and expense management processes; the purpose of these flowcharts is to demonstrate the separation of duties which ensures financial controls.

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 all new folks finding us for the first time. Our connection as a church community is precious, essential, and strong. I'm honored to serve First Church.

Jean Johnson  
Director of Administration

## MUSIC

### LEAD MUSIC DIRECTOR

#### STRENGTH OF OUR MUSIC TEAM DURING A UNIQUE YEAR

This was yet another church year of unplanned circumstances causing necessary pivots. This Fall, when the Strelitzer family experienced a serious motor vehicle accident which necessitated that Choral Director Tristan Strelitzer take leave to attend to his family's needs, Collaborative Pianist Teresa Drews immediately stepped up and offered to lead the Chancel Choir. While Teresa conducted and led rehearsals, Lead Music Director Alissa Rhode temporarily stepped into Teresa's normal position as pianist. Together, Teresa and Alissa covered the shifts originally designated for Tristan in our Sunday musician schedule. The Chancel Choir continued to rehearse and perform as previously scheduled until Tristan was able to return and conduct services on Christmas Eve. We are grateful for the continued strength, flexibility, talent and generosity of our entire music staff team.

#### AUDIO

Our music staff continues to work with our Audio and Livestream Teams to provide a reasonably high quality audio experience both live and online. While the blessings of variety we experience from service to service can at times pose significant challenges in this area, both our

in-room Audio and Livestream operators continue to provide thoughtful and careful attention to the task. We are extremely grateful to them for this important and valuable service. We would happily train and welcome more volunteers to join these teams!

#### CHORAL SCHOLARS

We have had at least 1 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 those funds run out, likely at the end of 2024-25.

#### HOUSE BAND

Our House Band held its first ever concert on March 8, 2024. Over 150 people attended, with ticket sales totaling \$5000 from presales through Feast for Funds along with followup sales through Eventbrite.

Alissa Rhode  
Lead Music Director

## RELIGIOUS EDUCATION

### MINISTER OF RELIGIOUS EDUCATION

**Rev. Kimberlee Tomczak Carlson**

#### MINISTRY WITH CHILDREN, YOUTH AND FAMILIES

This year marks a significant change in the religious education program's format and mission as we moved away from curriculum driven lessons to centering relationship, belonging, inclusion and choice in our religious education sessions on Sunday. Religious education for our children and youth begins in our sanctuary with the whole community. This September we adapted our Sunday service liturgical order so our children could experience core communal elements of our Unitarian Universalist tradition including chalice lighting, music, story, welcoming, mediation, and offertory before leaving the sanctuary for continuous religious education. The time the young people spend in our sanctuary with the community helps to nurture connection to our larger community and to our Sunday service format as they grow into adulthood.



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The RE program now features the church's monthly theme through projects, games, spiritual practice, and shared ideas that connect to our Unitarian Universalist values and history. It is our goal to offer children and youth a truly engaging, inclusive and educational experience every time they join us. When elementary age children, Youth and RE Volunteers leave the sanctuary and process to the lower level they have options to choose from. Our elementary age children begin as a large group for our RE chalice lighting, land acknowledgement, Indigenous people learning, discussion of monthly theme and activity such as the wonder box, singing or group game lead by me most Sundays. Afterward, we offer the children a choice of UU Play or UU Maker Space. UU Maker Space is all about unleashing creativity and exploration with a range of materials and activities as children learn through hands-on creation. In UU Play children learn through games that reflect our values as they build relationships with their peers and RE staff and volunteers. Throughout the year we also offer All-Ages RE, a time for a larger gathering when all our children and youth gather for social justice projects, i.e., Sandwich making for Guest house or creating, i.e. Valentines, or celebration, such as Halloween or Easter parties as well as preparing for upcoming services, such as our Holiday Pageant and RE Sunday.

This new format empowers our children to choose what best suits their needs and interest, allows for age integrated learning, is more inclusive and accessible to children's diverse abilities and allows RE staff and volunteers to stay focused on relationship building rather than content. Also, this is more sustainable for RE volunteers who are not responsible for managing children while leading complex lessons. We are fortunate to have dedicated and attentive RE volunteers, without whom we could not offer faith formation at First Church; however, we could use many more. Overall, the RE volunteers, parents, and children's response to the RE format change has been overwhelmingly positive. We experienced steady growth in RE registration and attendance. As we live into this new format, it is my goal to find new ways to integrate and track educational goals while still offering a holistic religious education.

For our youngest attendees, Cecelia Groshek is our nursery caregiver, who both manages and offers care in our nursery. Though we have made many improvements to our nursery and pre-school classrooms, the nursery space con-

tinues to be in high demand and is often overcrowded. We have had to limit the attendance to eight children per service to ensure the quality and care of our youngest attendees. We have plans to address this issue in the coming church year. Mariah Groshek continues to offer a warm welcoming presence leading our pre-school lessons utilizing Soul Matters themed lessons.

Additional initiatives of our religious education team include maintaining check-in attendance system for all 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, supporting the Parent Theme Circle, creating the R.E. Weekly Update and scheduling RE volunteers each week. We experienced steady growth in RE registration and attendance, though we continue to struggle with steady volunteer support. The RE volunteers allow us to offer these.

## CHILDREN, YOUTH AND FAMILY RE TEAM

Vision: The religious education program is rooted in the mission of the church, Nurture the Spirit, Engage the Mind, And Inspire Action. We envision a church community that models a way of being in the world that supports our children, youth, and families to develop a strong core of Unitarian Universalist values. 2023-24 Mission: Children's Religious Education Ministry Team's mission is to nurture spiritual growth by engaging and inspiring our children, youth, families, and volunteers. ~Rev. 2017-18 2020-21

2023-24 GOAL: Children's Religious Education Team 2023 goal is to welcome and connect families as we grow into our new RE format. We will focus on centering inclusivity and the diversity of our children, honoring the flexibility that every family needs, and working to create sustainable R.E. program. 2023-24

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 includes Thea Watters who continued as the chair, and Adam Zaiger, Megan Smith and Tammy Hilgeman, who are all new members of the team. This team rewrote the vision, mission and goals for the RE program and has helped usher in the new RE program format. I am grateful for their belief and dedication to continuing religious education and their sup-

# Staff Reports

port as we worked to transform the way faith formation is offered at First Church.

## 2022-23 CHURCH YEAR HIGHLIGHTS IN R.E.

The R.E. program contributed to and offered these special programs and events this year: Our Whole Lives for our 7-9th graders, Parents as Sexual Educators Small Group, Summer Family Outings, Sandwich Making for Guest House, Jingle Bus Ride, Mystery Friends pen pal exchange and party, Holiday Giving Tree, Regional Youth Conference-Wis-CON-sin, Valentine Making, Escape Room Outing for Youth, Self-Compassion learning with Jamie Lynn-Tatera, and Blessed at Pridefest.

Throughout the year we offer Multi-generational Worships, this year I lead and/or help co-create with our children, youth, and congregation. This year included a Thanksgiving service highlighting Native Americans called Givers and Receivers. I wrote our holiday pageant, The Mystery of Holiday Lights featuring the religious holiday of December and fifteen delightful and talented children. Additionally, I lead Sunday service in January and February, guided our Youth in the creation of Youth Service in March and am currently developing RE Sunday Service.

This year has set a foundation for a new way in faith formation. It has been a busy, growing, joy-filled year of new opportunities for our children, youth and families and I look forward to building on the good work we have begun.

With gratitude,  
Rev. Kimberlee

## 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 in grades 9-12 by working with adult advisers, staff, and parents. In addition, the YPC is responsible for coordinating the Our Whole Lives (OWL) sexuality and our faith education programs at First Church.

I maintained my 10 hour/week staff position and in November 2023 when our Membership Development Coordinator resigned, I assumed some membership tasks under Rev. Dena's supervision which included welcoming visitors to Sunday Worship, communicating with those interested our church contacting us via our website, contacting possible new members in our church portal and organizing our three Christmas Eve receptions.

I will be retiring from this position that I have treasured for the past ten years in June 2024. I am so very grateful that this church community has trusted me to practice meaningful, and sometimes life-changing, youth ministry with our youth.

## OUR WHOLE LIVES (OWL) PROGRAM

We offered our Grade 7-9 OWL program in person starting in September 2023 and had thirteen youth enrolled for the entire year long program. Thank you, parents of youth, and OWL facilitators, John Fitak, Katie Maedke Hall, Crysta Jarczyński, Jeremy Koenen, and Jessie Moffat for supporting our youth in this life changing sexuality and our faith program. Rev. Kimberlee and I met with the 7-9 OWL Facilitators throughout this year for reflection on the progress and needs of the group. Special appreciation is extended to

## RELIGIOUS EDUCATION METRICS

\*All but two of the non-member registrants joined the church by April 2024.

2023-24	2022-23	2021-22	2020-21	2019-20	Comparisons taken on average through the 2nd Sunday of March
69/12*	48/14	48	31	118	Number of registered children and youth: member/non-Member
40	32	10 online 16 in-person	21	56	Average Sunday RE Program Attendance, not including MG Services.

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Jacqi Akert who shared her time and professional health expertise with youth for four OWL lessons during our intense weekend of classes in April 2024.

Our Parents/Caregivers as Sexuality Educators online program returned this year once a month on zoom from October 2023 through May 2024 with seven parents participating under the leadership of Rev. Kimberlee, Rollie Hanson and myself.

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

## YOUTH GROUP: OVERNIGHT IN JANUARY 2024

We were so thrilled to finally host a Youth “con”- Wis-CON-sin- which is an event planned by youth with adult support for youth ages 14-18. At its heart, a youth con is an experience in building covenantal community. Each con has a different theme and focus, but they all incorporate community building, fun, worship, spirituality, and youth leadership.

Five of our high school youth group members planned this overnight on Sunday, January 14 to Monday, January 15, 2024 which was Martin Luther King Day under the leadership of Rev. Kimberlee and myself. Special thanks go to our adult youth advisers who stepped up to be adult chaperones for our weekend, Jessie Moffat, Nick Davia, Rollie Hanson and Bizzy Schultz.

We had twelve of our youth attending with an overall attendance of 49 youth from all over the region for a time to be social, crafty, thoughtful, and meet young UU’s from area Midwest churches. (Check out our mural created at this con displayed in the Emerson room.)

Youth Group 2023-2024

For the first half of our 2023-2024 church year, we tried offering twice a month in person youth group on Sunday mornings starting in September 2023. We took a break from this once-a-month meeting starting in January 2024 to meet weekly and plan our annual youth worship for the end of February 2024. In March, we resumed our youth group meeting once a month on the first Sunday. We used

our Soul Matters resources, and community building activities/games to add more structure to our youth group connecting to our monthly church themes. Our Sunday youth group includes high school youth and middle school youth.

Some of the activities our youth participated in were sandwich making for The Guest House, Holiday Pageant 2023, Forum host for speaker Michael Munson of FORGE., bowling after our youth service in February, and we were able to plan a visit to The Escape Room MKE in April 2024 for some fun on a Sunday afternoon.

The annual youth service (February 25), Asking Big Questions, was a time for our young people to create a service reflecting their hearts and minds. This year our youth were curious about exploring the BIG questions in life. What do we believe about the nature of the universe? What is good and evil? Why are we here and how should we live? Is their hope for our future and life after death? This service was well received as our youth took us on a philosophical journey exploring our beliefs about the universe and our purposes in it. Rev. Kimberlee and I met with eleven of our youth to plan this service for four Sundays, January 28 through February 18. Youth selected, The Church of the larger Fellowship Prison Ministry to be the February 2024 Share the Plate recipient.

Our Hearts on Fire program for our graduating high school seniors did not happen this year due to lack of interest and graduating seniors, but will be revisited for next church year.

Special thanks to our caring and supportive 2023-2024 youth adviser team members: Rollie Hanson, Bizzy Schultz and Nick DaVia.

Blessings,  
Deb Solis

## BLACK LIVES MATTER TO WISCONSIN UUS COLLABORATIVE

Black Lives Matter faced problems of ill health and turmoil. At the beginning of the church year one of the lead-

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ers, John Hagendorn became ill and passed away. His wife, Mary Devitt was consumed with taking care of him. I suffered a stroke in the fall. The main thing I was able to do was recruit George Bledsoe to take over chairing the Black Lives Matter Collaborative. First Church hosted a Grandmother's Hands event. I have faced health challenges during the spring which finally forced me to step down as chair.

Kenyatta Yamel

## COMMON GROUND

### Drivers Education

Students unable to afford driver's education will soon have an opportunity to take the course for free. Thanks to Common Ground's active coordination, Wisconsin high school students who qualify for free or reduced lunch at school will be eligible for a grant.

In December 2023, Governor Evers signed a bipartisan bill into law that will provide driver's ed grants to 15,000 students each year moving forward.

July 1, 2024 is the program start date.

### Tenants United

In March 2023, we launched our Tenants United campaign, working with HACM (Housing Authority City of Milwaukee) residents to build collective power, bring issues to the surface and hold HACM accountable. So far residents have seen some improvements. However, HACM continues to fall well short, to hide and hope that Common Ground and Tenants United will simply go away. We will continue to stand with residents and keep the pressure on HACM to give tenants a great place to live.

### Common Ground Works

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

Partnering with the CARA organization in Chicago, CGW has begun planning efforts by securing a growing list of funders and incorporating CGW as a nonprofit entity.

At the same time, we're working to identify organizations that can help people move from entry-level positions to those that offer a true career path forward.

### Forward Scholars

Studies show that students who cannot read proficiently by the end of third grade are four times more likely to not graduate high school. So, Common Ground initiated this unique tutoring program. Community-focused and volunteer-driven, this program reaches K5-3 students in select MPS schools who are not yet reading at grade level.

Paired with a caring adult, these children receive individualized, one-on-one instruction at school during the school day.

First Church is a major supporter of Forward Scholars, with Kristi Davis and Molly Schiffler serving on their board.

We wish to express our gratitude to the many 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, Mary Ann Fisher, Jerry Fredrickson, Allan Jaberg, and Cathy Startt.

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

Jerry Fredrickson

## EARTH JUSTICE MINISTRY

First Church's Earth Justice Ministry (EJM) engages church members with the Unitarian Universalist principle of re-

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spect for the interdependent web of all existence of which we are a part. We generate activities that promote environmental justice and develop spiritual growth through a connection with nature.

EJM's attempt to return to a "new normal" this year, after being shut down during the pandemic, was to have regular monthly meetings named, "Fun, Food, and Future" and emphasize relationship-building. We had several such meetings with an unprecedentedly large attendance; a strong sense of participation and shared leadership emerged.

For example, with the Social Justice Council's emphasis on groups' working with the Defend Democracy team this year, and building on DD's successful letter-writing in the 2022 election, EJM led the congregation in writing 1,000 get-out-the-vote postcards on all four Sundays during "Earth Month" (April.) These cards will be mailed in July before the August partisan primary. The cards were provided by the Wisconsin Citizens' Climate Lobby, and follow the model of the Environmental Voter Project, which aims to turn known environmentalists who are irregular voters into regular voters. We raised money for stamps with "Change for Change" collection baskets during these April post card writing events. Thanks to Terry Wiggins for organizing this effort.

We continued our monthly Walk and Roll events, which were initiated during the pandemic as a way to gather and get outdoors. Jacki Zandi and Paula Anderson took on the planning and publicity of these events. In cold weather months we visited indoor spaces: the School of Fresh Water Sciences and the Mitchell Park Domes. EJM joined young FUSM families for the Milwaukee Riverkeeper's 29th annual Earth Day River Cleanup.

We understand that racial, economic, and environmental injustice are overlapping, so we work to establish partnerships to amplify our work. This year, we maintained our relationship with COLE (Coalition on Lead Emergency) and Plastic-Free Milwaukee, having liaisons to both organizations -- Terry Wiggins and Kim Lamers, respectively.

During a busy Earth Month (April), in addition to our work to get out the vote and on river cleanup, we sponsored films in members' homes from the One Earth Film Festival.

It was a busy April! Thanks to Ann Ritchey Kransdorf for organizing this effort.

Bruce Wiggins

## INTERCHANGE FOOD PANTRY

We served 79,012 guests at the pantry (47% of them children) in 2023 for another record-setting year—up from 55,769 the previous year and 13,871 in 2019. To help manage this growth, we have decided to go back to our pre-pandemic policy that guests may come and get food only one time per month (about 20% of our guests were coming in more than once per month), starting in January 2024.

Much of the early part of 2023 was spent working on a plan to restructure our board. After hiring a consultant to advise us, we restructured and trimmed down our board of directors to make the board more nimble and responsive, and we updated our bylaws to reflect that. Beth Bruch continues to serve as Secretary on the new board, and Tim Ottman has moved into the Vice President after four years at the head of the Operations Committee. We're both on the Executive Committee as well. There's a plan to create a separate Advisory Council, but that group has not yet taken shape.

Highlights from 2023: We added a commercial two-door refrigerator and freezer funded by the Greater Milwaukee Foundation at our satellite food pantry at Redeemer Lutheran. We hired a new full-time office administrator and pantry assistant, who is managing volunteers and working on updating our website and social media presence. We updated our operations manual after an effort led by Tim to document our operational procedures. We had a very successful Thanksgiving Dinner giveaway, serving 1,304 households (up from last year's 1,024) at three locations, with about 150 volunteers working to serve lines around the block for a choice of a turkey or a ham, all the trimmings and 20 pounds of fresh fruits and vegetables.

Our most popular offerings continue to be our fresh fruits and vegetables. Due to the lack of quality donated produce, we continue to purchase high-quality, consumer-friendly,

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and culturally specific produce from local wholesale produce companies.

We continue to serve hungry people in Milwaukee—regardless of their zip codes—with kindness and respect by providing quality groceries for well-balanced meals.

We're proud of the part First Unitarian Society of Milwaukee plays in implementing the pantry's mission of improving the health and well-being of our guests through nutritious food and compassion. Our church has been a founding supporter of Interchange Food Pantry (IFP) since the pantry's inception in 1971.

Beth Bruch

## SUNDAY FORUM

Co-Chairs: Mark Mueller & Lorraine Jacobs

2024-2025 Goals:

- Build the Sunday Morning Forum Technology Team, including equipment options.
- Encourage/Recruit new Members interested in sharing the responsibilities of Co-Chair. Lorraine Jacobs will leave her Co-Chair role August 31, 2024.
- Extend the Role of Host to fully support and guide scheduled presenters.
- Expand the demographic range of Hosts.
- Encourage and build Forum Topics selections through partnership with church interest groups, programs, RE, music/arts.

Mark and Lorraine appreciate the dedication of the Sunday Forum Group. These Members manage Forum Zoom/Live-Stream recordings, and the Host presenters responsible for inviting, scheduling and guiding presenters. Group Members include: Barbara Collignon, Jerry Fredrickson, Dianna Dentino, Barbara Leigh, Trent Miller, Bruce Wiggins, Juliet Hills, Deb Solis, JoAnn Bachar, George Bledsoe, Pat MacFar-

land. We honor our Emeritus Members: Thallis Drake, Christian Becker.

The Sunday Forums have been regularly offered on Sunday mornings at First Unitarian Society-Milwaukee for close to 60 years. Scheduled weekly, at 10:00-11:00am, in Max Otto Hall, presentations are live/in person events with coffee and hot water for tea. They are also recorded on Zoom or Live Stream for viewing on the First Unitarian-Milwaukee YouTube Channel. Average in-person attendance is 25 - 35. Topics are appreciated by attendance of "regulars" and visitors.

Consider joining the Sunday Forum team. Our Spring bi-annual meeting will be Wednesday evening, June 12, 2024. We review topics and plan the September 2024- January 2025 Series. (A November meeting will review Forums for Feb. - May 2025).

If you are interested in learning more about how Forums happen or details about the June 12th meeting please contact Mark Mueller [muellerx@sbcglobal.net](mailto:muellerx@sbcglobal.net) or Lorraine Jacobs [jacobslm@sbcglobal.net](mailto:jacobslm@sbcglobal.net)

Lorraine Jacobs

## MICAH

This past year MICAH renewed old partnerships, forged new ones, and introduced structural changes. Some highlights appear below.

### By-Laws & Governance Changes

A new governance structure was effective January 2024. By-laws updates redefined the Board of Directors as the Executive Committee, Religious Leaders Caucus Chair, and chairs of MICAH Committees/Task Forces/Campaigns.

Congregation/Organization representatives and Board members form a Leadership Council. Each member Congregation/Organization has one voting member and an alternative.

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## **Black History Month Celebration - Turn Up & Turn Out to Vote**

On February 22, 2024, a capacity crowd of 171 people witnessed the diversity and strength of MICAH. Featured speakers included former Lt. Governor Mandela Barnes and Ms. Anita Johnson. The event closed with a dynamic Call to Action from Mrs. Brenda Jackson.

## **We All Belong Campaign (WAB)**

Nearly 100 religious leaders from many faith traditions attended the press conference on August 3, 2023, to formally launch MICAH's "We All Belong" campaign. WAB teams for Education, Media, Voter Engagement, and Rapid Response are sponsoring educational events, public actions, and voter engagement/registration throughout the year.

WAB representatives participated in our Defend Democracy Day on January 7, 2024, and engaged First Church members at the Sunday FORUM on May 5, 2024.

A major event on July 14, 2024, with national and local speakers, entertainment, worship, music, and poetry will counter the anti-democratic, anti-immigrant, white "christian" nationalist messages anticipated at the Republican National Convention.

## **Coalition on Lead Emergency (COLE)**

June 2023 canvassing in the 53205 and 53206 zip codes reached 1022 homes, with 253 families enrolling in COLE's lead free program and receiving kits which include filtering pitchers. Much work remains in the fight for a lead-free Milwaukee.

## **Education Task Force**

Partnering with the Equity Coalition, MICAH has kept pressure on MPS Administration and staff to address inequity in policies, practices, and procedures that have contributed to historic and unacceptable educational achievement gaps and disproportionate suspension rates for students of color.

## **Health Equity Initiative**

Health Equity Summits added energy to the quest for a pediatric clinic to fill the vacancy created when Children's Hospital closed services at 29th and Clark Streets. Ongoing discussions with Children's Hospital and other key players seek a satisfactory resolution to this "health desert".

## **Jobs and Economics/Transportation Task Force**

MICAH and the Coalition for More Responsible Transit continue to voice objections to the \$1.7 billion I-94 expansion project approved by WISDOT.

Bob Monahan

## **TRANS AND QUEER FOR UU (TQUU)**

In the Fall of 2023, First Church organized a Trans Inclusion class offering for a small group of members and staff. Attendees met regularly for 3 months to learn about trans inclusion and discuss ways to make our church more welcoming to the trans community.

The T&Q for U&U team was born out of that class. Our team wanted to continue working together so we could take the ideas and enthusiasm from our conversations, and implement them into change within our congregation.

Our team's purpose is to lead culture and systems change at First Church to create a spiritual community where trans and queer people fully belong and are part of the fabric of our congregation.

To start, we plan to work on communications and messaging. We're working on developing trans-inclusive language and images that can be included in worship services, online, in our printed materials and in our building, to make it clear to members and guests that trans people are welcome here.

We also look forward to partnering with other congregations and local LGBT groups to broaden our connections in the queer community. Look for us at the Pride Parade this

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year! And please reach out if you would like to learn more about what we are up to.

Luc Maker

## **THE SWANS (SENIOR WOMEN ARE NATURALLY SOCIAL)**

The SWANS (Senior Women are Naturally Social) have been around since 2009 and now that Covid is no longer a threat, the flock is gathering again for friendship and mutual support. We started as Senior Women Alone or Newly Single but found Senior Women are Naturally Social is more inclusive. This past year we met occasionally for lunch, museum visits and attended member Judy Friebert's art exhibition. Sunday, May 5th, we'll visit the Milwaukee Art Museum for their special exhibit and again break bread in fellowship.

Barbara Collignon

## **THE CHRONOLOGICALLY GIFTED**

The Chronologically Gifted were grateful to be able to meet in person after being confined to Zoom meetings during Covid. We met several times from September to May (December and January excepted) for potluck lunch in Otto Hall following the 11:00 service. We were joined by several new members and by Stephen Sieck. We enjoyed sharing jokes, news and concerns and took pleasure in fellowship and building new friendships. On the average, we numbered 16 persons in attendance.

Barbara Collignon and Juliet Hills

Co-Leaders



**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.**